

**NARRATIVE**  
RESEARCH

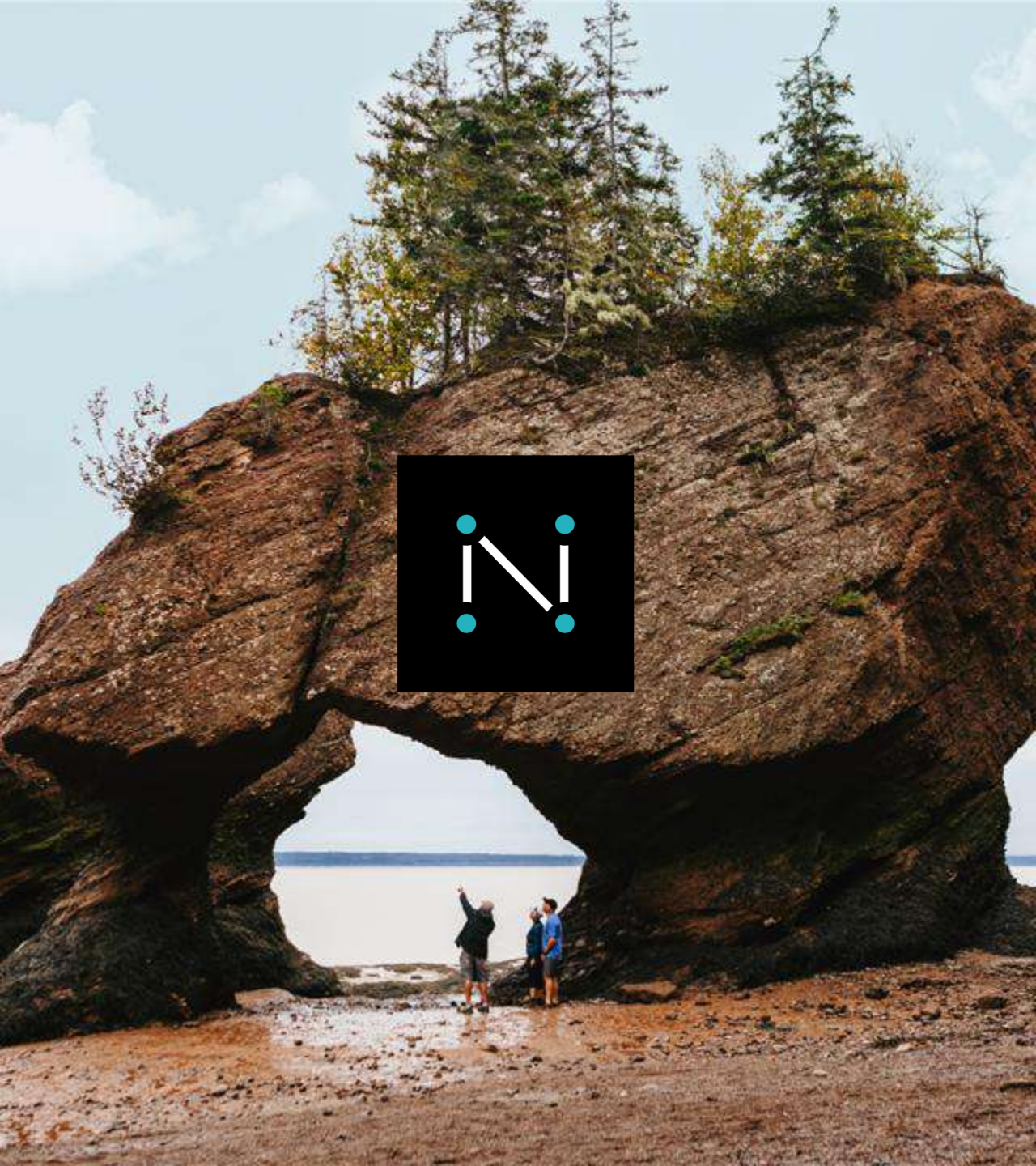
# 2025 UK Consumer Research Report

May 2025

Prepared for:



*This project has been made possible through funding provided by the Atlantic Canada Agreement on Tourism (ACAT). ACAT is a nine-member pan-Atlantic initiative comprised of the Atlantic Canada Opportunities Agency, the four Atlantic Canada Tourism Industry Associations, and the four Provincial Departments responsible for tourism.*



## Background & Purpose



# Background & Research Objectives

Travel has experienced profound changes since the COVID-19 pandemic, driven by shifts in behaviour and travel preferences, industry adaptations, and a variety of new challenges (e.g., global inflation, changes in travel protocols, etc.). Post-pandemic fallout has accelerated existing trends and introduced new dynamics. Various reports coming out of the United Kingdom (UK) suggest recent UK travel habits have been notably impacted by both economic considerations and evolving interest in diverse holiday experiences. These findings include a rise in domestic/European travel, increased focus on value and travel flexibility, growth of sustainable tourism and cultural/experiential travel experiences, the increasing influence of social media, particularly among younger travellers, and an expanded travel season. The Association of British Travel Agents has also reported a rise in usage over the past year. That said, despite economic pressures, international travel by UK residents continues to be strong, and the UK remains a critical market for Atlantic Canadian tourism.

With this in mind, the Tourism Industry Association of Prince Edward Island (TIAPEI), through the Atlantic Canada Agreement on Tourism (ACAT), commissioned Narrative Research to undertake quantitative research with travellers from across various regions of the UK to better understand this market's current mindset as it relates to travel habits and intentions, specifically with regards to Atlantic Canada. Moreover, this study aimed to examine reactions to current marketing campaigns for each Atlantic Canadian province and their impact on travel intentions in the near future.

In particular, the intent of this research was to gain market insights into UK travellers in terms of:

- Levels of awareness, familiarity with Atlantic Canada/provinces (in terms of leisure travel destination);
- Past trips to Atlantic Canada/individual provinces;
- Motivators for travel to Atlantic Canada/provinces;
- Barriers/perceived obstacles for travel to Atlantic Canada/provinces;
- Use of travel agents, specifically in relation to potential trips to Atlantic Canada/provinces;
- Destination appeal, ad/creative evaluation and impact of ad exposure on likelihood to visit;
- Barriers/perceived obstacles for travel to Atlantic Canada/provinces;
- Anticipated modes of transportation between provinces if visiting the Atlantic Canada region (including awareness of air access/direct flights from the UK); and
- Destination appeal, ad/creative evaluation and impact of ad exposure on likelihood to visit.





## Overview

To meet study objectives, an online survey was conducted with members of a general population online panel. A total of 1,206 travellers from the UK took part in the study. To qualify, all participants had to hold a valid passport AND:

- Have taken at least one long-haul leisure trip of at least 4 nights outside the UK during the past 3 years (with at **least 1 night spent in a paid accommodation**); or
- Have definite plans to take such a trip over the next 2 years; and
- One-half of respondents had to have travelled to Canada for a long-haul leisure trip within the past three years.

Overall, 97% of those who completed the survey have taken a recent long-haul trip and 3% have definite plans to take such a trip soon.

The survey was designed in consultation with the ACAT research team.

The following presents a summary of results. Two sets of data tables are provided, one for recent visitors to Canada (Appendix A) and one for non-recent visitors to Canada (Appendix B). Each table set includes results broken down by question with banners for UK region and other key demographics. Given that the online survey is a non-probability sample, a margin of error is not applied to results.



**Mode:** Online survey



**Audience:** Long-haul travellers from the United Kingdom



**Completes:** **1,206** travellers  
(604 who had visited Canada in the past 3 years & 602 who had not)



**Data Collection Dates:**  
March 7 - 16, 2025



**Average Completion Time:**  
14.5 minutes





# Study Highlights

## UK Travellers

*Findings suggest there are two distinct types of UK long-haul travellers - those who travel closer to home or to more select distant destinations, and travellers who visit more destinations, focused on more discovery and exploration.*

- Recent visitors to Canada tend to be a UK visitor who is much more predisposed to long-haul travel to a wider variety of destinations. They tend to be younger, more likely to travel with a spouse/partner or family, employed full-time, and more affluent than non-recent visitors to Canada. Recent visitors to Canada are also more likely than non-recent visitors to be from the London or Greater London region.

## Travel Activities

*Awareness of each Atlantic Canada province varies somewhat, with Nova Scotia being the most recognized and familiar within the Atlantic region.*

- UK travellers are well-travelled, with recent visitors to Canada having taken more frequent long-haul trips than non-recent visitors to Canada in the past three years. Indeed, recent visitors to Canada have visited more than twice as many long-haul destinations than non-recent visitors. Those who have recently visited Canada are notably more likely to also report having visited several non-European destinations including the United States, Australia, the United Arab Emirates, Japan, and Mexico, among others.
- Among UK travellers who have recently visited Canada, Ontario (49%) and British Columbia (43%) are the most common provinces visited, distantly followed by Quebec (30%) and Alberta (25%). Each of the **Atlantic Canada provinces** have been visited by at least one in ten UK visitors to Canada (NS: 17%; PEI: 14%; NL: 12%; NB: 11%).
- In terms of awareness, Ontario, British Columbia and Quebec garner the highest levels of awareness among UK long-haul travellers. Awareness of the Atlantic Canada region varies, with UK travellers reporting highest awareness of Nova Scotia (68%), regardless of whether they have recently visited Canada. At the same time, almost six in ten were aware of Newfoundland & Labrador, while approximately one-half are each aware of New Brunswick and Prince Edward Island. Of those aware of each Atlantic Canadian province, familiarity with what there is to see and do in that province is modest. Recent visitors to Canada are more likely than non-recent visitors to be aware of and familiar with each province in Atlantic Canada.
- While there was considerable variation, those who recently visited Canada, reported an average budget of just over £4,800.

## Travel Intentions

*If coming to the Atlantic Canada region, most UK travellers would intend to visit multiple provinces, with airplane and car being the most anticipated means of commuting between provinces.*

- There is clear intention to visit Canada in the next two years, most notably among those who have recently visited Canada.





## Study Highlights - *Continued*

- Among those open to visiting Canada, one-half would consider going to all four Atlantic Canadian provinces, with various outdoor aspects being key motivators for visiting the region, including general sightseeing and exploring distinct scenery, seeing natural wonders, and nature parks. When asked if they would visit a single province in the region or multiple provinces if planning a trip to Atlantic Canada, a clear majority would visit multiple provinces.
- Various factors play an important role in considering Atlantic Canada, with the ability to arrange travel throughout the region being considered most critically important. Airplane and car are the most anticipated means of travel between provinces.
- Those who are unlikely to consider Atlantic Canada cite a variety of reasons or barriers for not considering the region, with a preference for other non-specified locations or no knowledge of the region being mentioned most often.

### Information Sources

*UK travellers would rely on a variety of sources for information if coming to Atlantic Canada, with a clear majority indicating they would use a travel agent or tour operator.*

- UK travellers open to visiting at least one Atlantic Canadian province indicate they would rely on a range of information sources with destination websites, online review sites, and travel booking sites like Expedia and Travelocity being most common. Three-quarters of recent visitors to Canada indicate they would use a travel agent or tour operator if they were planning a trip to Atlantic Canada, particularly for booking flights and accommodations, while six in ten non-recent visitors would use a travel agent or tour operator, which is consistent with other research studies.

### Ad Evaluation

*Each provincial campaign is considered appealing to a clear majority of UK travellers, with recent past visitors to Canada being notably more likely than non-recent visitors to offer a positive assessment of each campaign.*

- When examining a series of 12 general images of places and things to do in Atlantic Canada, all were considered effective in attracting UK travellers to the region for a vacation, albeit to varying degrees. Overall, the images of distinct or unique offerings (e.g., the whale, iceberg, and the various coastline images in more remote areas) are deemed especially effective.
- After seeing the ads for each of the four provinces, most UK travellers overall found each campaign appealing. The ads performed strongly when considering if a campaign would motivate them to travel to the province and/or encourage them to learn more about that province. Recent visitors to Canada were far more likely than non-recent visitors to offer favourable reviews of each campaign. An infographic summary of ad evaluation results is presented on the next page.
- Overall, ad exposure appears to positively impact likelihood to visit Atlantic Canada. For each Atlantic Canada province, after seeing ads for the sights and activities, most express some likelihood to consider taking a pleasure trip to that province in the next two years. Recent visitors to Canada are notably more likely than non-recent visitors to consider such a trip.





# ACAT – 2025 UK Consumer Study

## Key Highlights: Ad Evaluation



### New Brunswick Ad Evaluation



#### Agree these ads...

Include things that are of interest to me  
Grab my attention  
Show unique offerings  
Encourage me to find out more about NB  
Motivate me to travel to NB in the future  
Speak to me personally

	Recent Visitors to Canada	Non-Recent Visitors
Include things that are of interest to me	83%	59%
Grab my attention	80%	58%
Show unique offerings	80%	58%
Encourage me to find out more about NB	80%	55%
Motivate me to travel to NB in the future	78%	49%
Speak to me personally	75%	47%



#### Pleasure trip to NB after seeing ads

Full Base

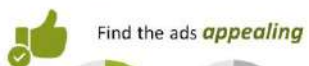
Likely to Consider

80/20 Rule Applied

	Recent Visitors to Canada	Non-Recent Visitors
Likely to Consider	71%	31%
80/20 Rule Applied	40%	13%



### Nova Scotia Ad Evaluation



#### Agree these ads...

Include things that are of interest to me  
Grab my attention  
Show unique offerings  
Encourage me to find out more about NS  
Motivate me to travel to NS in the future  
Speak to me personally

	Recent Visitors to Canada	Non-Recent Visitors
Include things that are of interest to me	88%	74%
Grab my attention	86%	70%
Show unique offerings	83%	66%
Encourage me to find out more about NS	85%	68%
Motivate me to travel to NS in the future	85%	64%
Speak to me personally	79%	58%



#### Pleasure trip to NS after seeing ads

Full Base

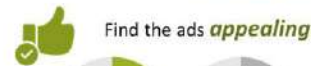
Likely to Consider

80/20 Rule Applied

	Recent Visitors to Canada	Non-Recent Visitors
Likely to Consider	78%	41%
80/20 Rule Applied	45%	18%



### Newfoundland & Labrador Ad Evaluation



#### Agree these ads...

Include things that are of interest to me  
Grab my attention  
Show unique offerings  
Encourage me to find out more about NL  
Motivate me to travel to NL in the future  
Speak to me personally

	Recent Visitors to Canada	Non-Recent Visitors
Include things that are of interest to me	89%	77%
Grab my attention	87%	76%
Show unique offerings	89%	74%
Encourage me to find out more about NL	86%	71%
Motivate me to travel to NL in the future	85%	67%
Speak to me personally	80%	62%



#### Pleasure trip to NL after seeing ads

Full Base

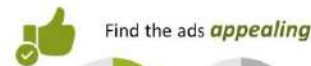
Likely to Consider

80/20 Rule Applied

	Recent Visitors to Canada	Non-Recent Visitors
Likely to Consider	74%	40%
80/20 Rule Applied	41%	17%



### Prince Edward Island Ad Evaluation



#### Agree these ads...

Include things that are of interest to me  
Grab my attention  
Show unique offerings  
Encourage me to find out more about PEI  
Motivate me to travel to PEI in the future  
Speak to me personally

	Recent Visitors to Canada	Non-Recent Visitors
Include things that are of interest to me	81%	55%
Grab my attention	81%	54%
Show unique offerings	79%	52%
Encourage me to find out more about PEI	81%	53%
Motivate me to travel to PEI in the future	77%	46%
Speak to me personally	74%	45%



#### Pleasure trip to PEI after seeing ads

Full Base

Likely to Consider

80/20 Rule Applied

	Recent Visitors to Canada	Non-Recent Visitors
Likely to Consider	72%	32%
80/20 Rule Applied	42%	15%





# Looking Forward

Results of the UK Consumer Research Study suggest the following considerations:

- Findings indicate that UK **long-haul travellers exhibit diverse characteristics and behaviors**. There appears to be those who stay closer to home (i.e., more domestic or Europe), and those who venture farther away with interest in exploration and discovery. The latter better reflects visitors who have visited Canada in the past three years. Past experience with travel to Canada has a clear and significant impact on perceptions and travel intentions to Atlantic Canada. Further, recent visitors to Canada from the UK share a somewhat different profile than those who have not been to Canada recently. Not only are they younger, more affluent, travelling with a spouse/partner or family, and more likely to be from Greater London, but they are also more likely to take a greater number of long-haul trips and to farther distances from home. Past visitors to Canada reflect a key opportunity for Atlantic Canada visitor potential. As such, focusing marketing efforts on previous visitors to Canada will likely have a positive impact.
- **UK travellers are generally open to considering Atlantic Canada as a long-haul destination choice, especially among those who have recently travelled to Canada.** UK travellers are especially interested in flying direct to their destination, and findings suggest greater efforts are needed to highlight the non-stop connections to the region. UK travellers have an interest in visiting multiple provinces in the region when visiting, and place considerable importance on being able to easily travel within the region. This, however, reflects a limited awareness of the actual travel distance between provinces. Findings suggests there is an opportunity to consider regional travel promotion, including potentially presenting various interprovincial travel options. That said, limitations in interprovincial travel options and current economic conditions could impact UK travel plans.
- Despite expressed consideration of Atlantic Canada as a travel destination, when it comes to destination choices, **the region faces clear competition when it comes to the UK market**, particularly as UK travellers express growing intentions to increase their domestic travel, have moderate to low awareness and familiarity with Atlantic Canada and its offerings, and are well travelled to multiple other long-haul destinations.
- Overall, the **current advertising campaigns for each Atlantic Canadian province are considered appealing** to a clear majority of UK travellers overall, particularly among recent visitors to Canada. Moreover, the campaigns appear to have a positive impact on building interest in visiting multiple provinces. When examining individual visual components that may be included in any future campaign, results suggest consideration should be given to incorporating visuals that showcase panoramic views of the region's unique geographic offerings and/or distinct landscape that may suggest a sense of discovery and awe-inspiring exploration.







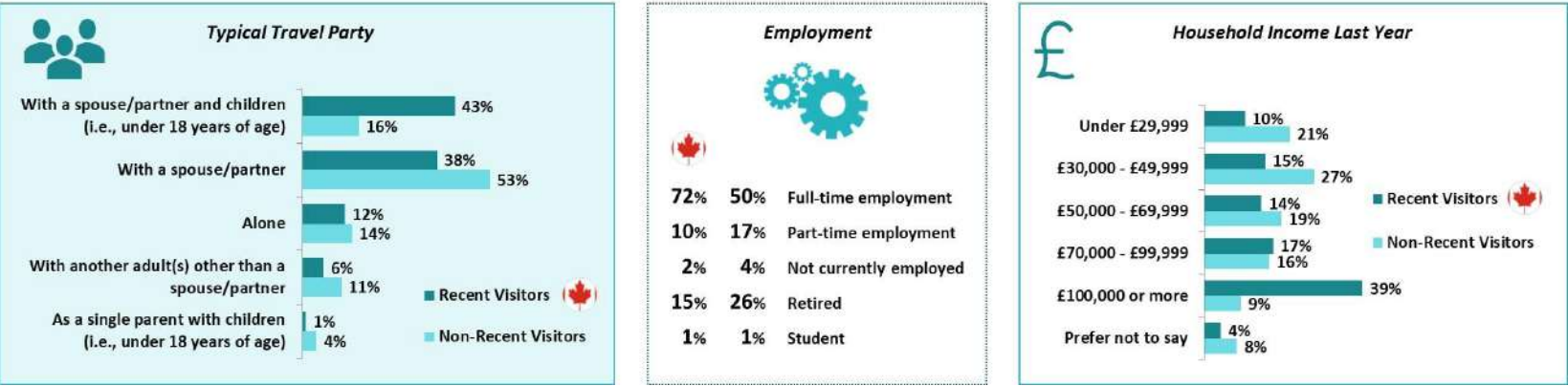
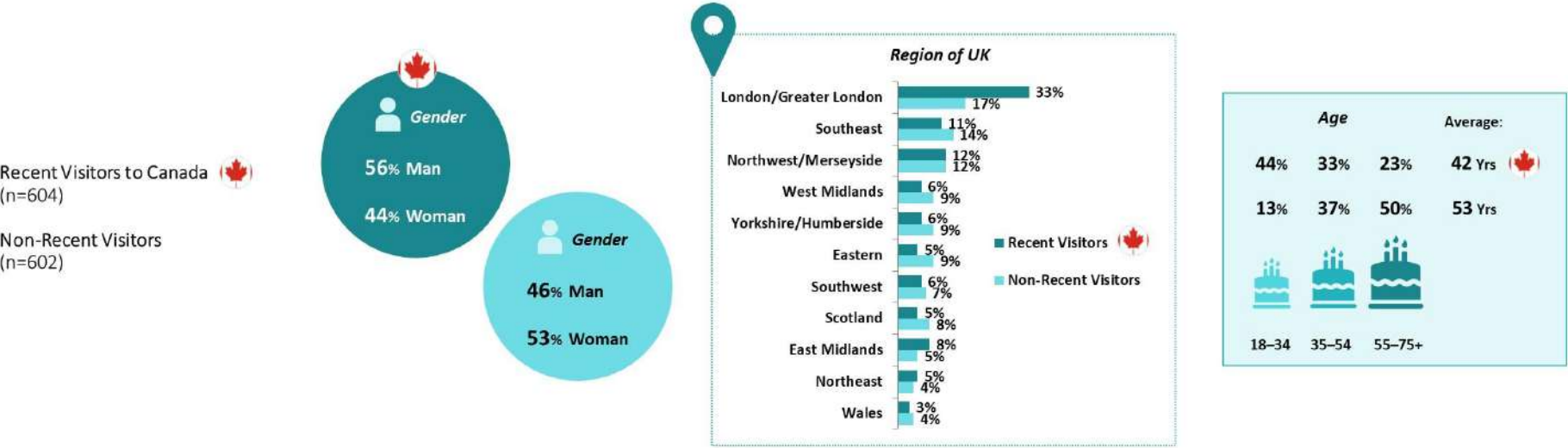
# Respondent Profile

*The following outlines the demographic and regional breakdown of respondents.*



# Respondent Profile

The following provides a profile of survey respondents. Of note, findings suggest that recent visitors to Canada tend to be younger, more likely to travel with a spouse/partner or family, employed full-time, and more affluent than non-recent visitors to Canada. Further, recent visitors to Canada are more likely than non-recent visitors to be from the London or Greater London region.







# Travel Activities

*The following section provides an overview of respondents' recent travel activities, including travel to Canada.*



# Travel Status

Over the past three years, UK travellers who recently visited Canada have taken more long-haul trips than non-recent visitors to Canada.

As noted, screening criteria for the survey included either having taken at least 1 long-haul leisure trip of 4+ nights outside the UK in the past 3 years, or intentions to do so in the next 2 years. (Tables 6, 7, and 8)

- Findings show that the average number of long-haul trips is notably higher among those who have visited Canada in the past three years versus those who have not (5.9 versus 3.4). The average number of long-haul leisure trips is further elevated among UK visitors to Atlantic Canada (7.9).
- Overall, the average number of long-haul leisure trips taken declines with age and increases with household income. It is also highest among those with full-time employment, followed by those with part-time employment, and then those retired. Across regions, the average number of trips is highest among London/Greater London residents, and lowest among residents in Southeast/Southwest and East Midlands/Eastern.

## Long-Haul Leisure Trip of 4+ Nights Outside of the UK

In the Past 3 Years



Q.6: In the past three years, have you taken a **long-haul leisure trip of four or more nights** outside of the UK, where at least one night was spent in paid accommodations, including trips to visit friends and relatives and combined business-pleasure trips? Please exclude any travel that was solely for business purposes, and trips for specific personal reasons (e.g., to attend wedding/funerals, for medical reasons, etc.). (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

Q.7: [IF HAVE TAKEN SUCH A TRIP – ‘YES’ IN Q.6] How many separate **long-haul leisure trips** of four or more nights have you taken in the past three years outside the UK (again, thinking of those trips where at least one night was spent in paid accommodations)? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=564) *Note: Responses of ‘Don’t know/Unsure’ have been removed from the calculation of the average number of trips taken.*

Q.8: [IF HAVE NOT TAKEN SUCH A TRIP – ‘NO’ IN Q.6] Over the next two years, do you have definite plans to take a **long-haul leisure trip** on which you will spend four or more nights outside the UK where at least one night will be spent in paid accommodations? (Non-Recent Visitors to Canada, n=38)\* *\*Caution: Small sample size.*





# Destination Countries of UK Travellers

*UK travellers who have visited Canada in the past three years have explored more than twice as many different long-haul destinations than non-recent visitors to Canada.*

By design, one-half of survey respondents had travelled to Canada in the past three years. When considering UK travellers' long-haul leisure travel destinations, some interesting differences warrant attention between those who have visited Canada in the past three years, and those who have not. (Table 9)

- Those who have recently visited Canada are notably more likely to report having visited several non-European destinations including the United States, Australia, the United Arab Emirates, Japan, and Mexico, among others.
- On average, recent visitors to Canada have visited twice as many long-haul leisure trip destinations over the past three years than non-recent visitors to Canada (4.2 vs. 1.8 destination countries).
- Regardless of past visitation to Canada, travellers from London/Greater London are more apt to have visited Canada or the United States than those from elsewhere. While visits to the United States are relatively equal across age segments, younger travellers are notably more likely to have travelled to Canada than older travellers. Canada outranks the United States as the top destination among 18–34-year-old travellers. The number of visits to multiple destinations increases with household income. Of note, the proportion travelling to Canada increases from 35% among those with household incomes of less than £50K to 80% among those with household incomes of £100,000 or higher.
- Finally, those who are retired are more apt to have visited the United States than Canada.

**Destination Countries**  
Long-Haul Leisure Trips in the Past 3 Years

	Recent Visitors to Canada	Non-Recent Visitors
Average # of Destinations	4.2	1.8
Canada	100%	0%
United States	57%	44%
Europe	40%	40%
Australia	30%	9%
United Arab Emirates	22%	9%
Japan	19%	6%
Mexico	15%	6%
Caribbean	13%	13%
China	14%	3%
Central America	12%	5%
Singapore	11%	4%
New Zealand	11%	3%
South America	11%	3%
Middle East/North Africa	10%	7%
Thailand	10%	6%
Other Africa	8%	7%
India	8%	5%
Korea	8%	2%
Indonesia	5%	1%
Vietnam	4%	2%
Philippines	4%	1%
Cambodia	3%	2%
Taiwan	3%	0%
Bhutan	2%	0%
Other	1%	3%
None	0%	3%

Q.9: Considering the long-haul leisure trips that you have taken in the past three years, which destinations have you visited? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

# Canadian Provinces Visited

*Ontario and BC, followed by Quebec and Alberta, are the top Canadian destinations for UK visitors, with visits to Atlantic Canada not far behind.*

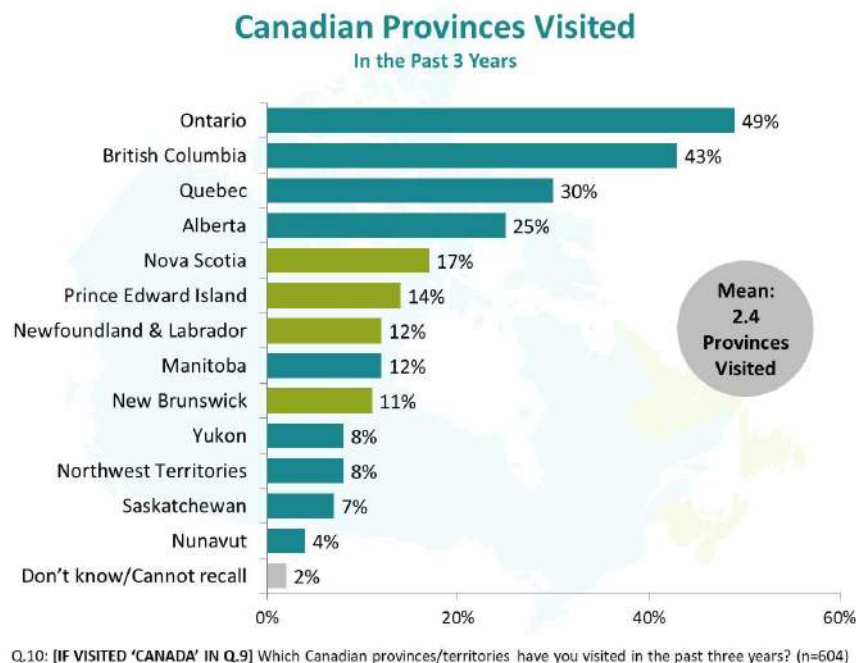
One-half of UK visitors to Canada in the past three years have visited **Ontario**, while just over four in ten have visited **British Columbia**. Three in ten have visited **Quebec**, while one-quarter have visited **Alberta**. Each of the **Atlantic Canada provinces** has been visited by at least one in ten UK visitors, with Nova Scotia being the most visited. (Table 10)

- Consistent with recent visitors to Canada overall, visitors to the Atlantic Canadian provinces tend to be younger.

Among UK visitors travelling to multiple provinces/territories, there is an even split between those **going to all the provinces visited in a single trip** and those **visiting multiple provinces over multiple trips**. (Table 11)

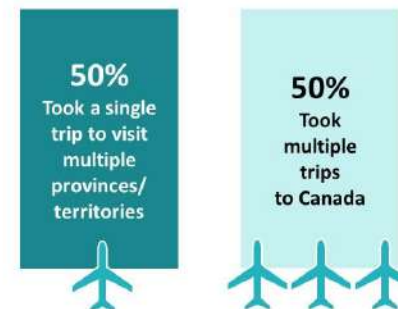
- The likelihood of taking a single trip to visit multiple provinces increases with age, while the likelihood of multiple trips is higher among younger travellers. Those with household incomes of £50K or higher are more likely to have taken multiple trips compared with those with lower household incomes.

**50%**  
Visited  
Canada  
(per sample  
specifications)



## Single or Multiple Trips to Canada

In the Past 3 Years



Q.11: [IF VISITED MULTIPLE PROVINCES/TERRITORIES IN CANADA IN Q.10] And did you visit [both/all] of these provinces/territories as part of a single trip, or did you take multiple trips to Canada during this timeframe? (n=339)



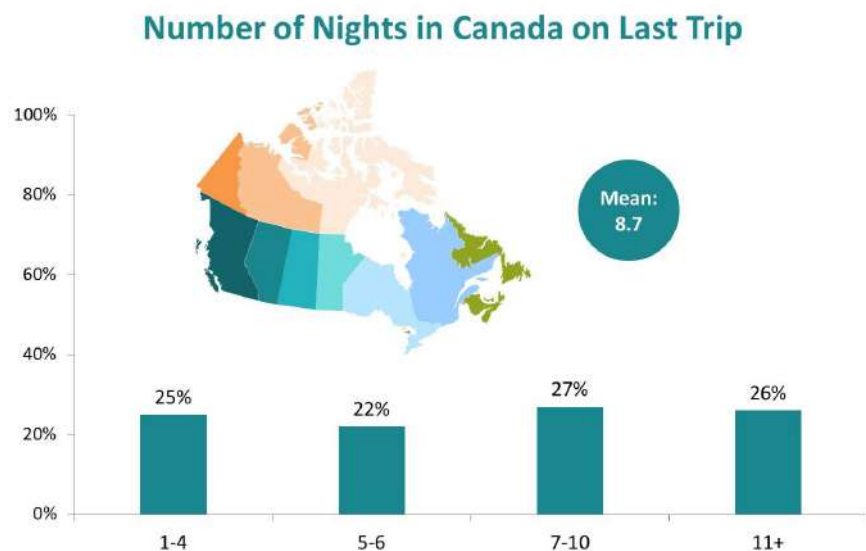
# Nights Spent

*On average, UK visitors stayed more than a week in Canada. Those visiting Atlantic Canada spent, on average, approximately 2-3 nights in each respective Atlantic Canadian province they visited on their last trip, although the number of nights stayed varies within each province.*

The number of reported nights in Canada on the most recent trip varies, with an **average of 8.7**. (Table 12)

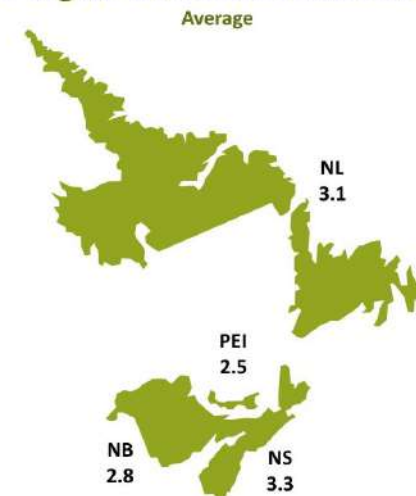
- The average number of reported nights stayed increases with age and declines with household income. The average number of nights stayed is higher among those retired, and lower among those employed full-time.
- Across UK regions, the average number of nights stayed in Canada is lower among visitors from London/Greater London (6.8) than elsewhere (Scotland/Northeast: 8.2; Northwest/Merseyside/Yorkshire: 10.4; Wales/West Midlands: 9.9; East Midlands/Eastern: 10.2; Southeast/Southwest: 9.3).

The average number of nights spent in Atlantic Canada varies across the provinces (NB: 2.8; PEI: 2.5; NL: 3.1; NS: 3.3). It warrants mention that the average number of nights stayed varies notably within each province, reflective of the fact that many travellers may have visited multiple provinces during their visit. (Table 13)



Q.12: [IF VISITED 'CANADA' IN Q.9] Thinking of your last trip to Canada, approximately how many nights were you in Canada on this trip? (n=604) *Note: Responses of more than 50 nights were excluded from the calculation of the mean.*

## Number of Nights in Atlantic Canada on Last Trip







Q.13: [IF VISITED ANY ATLANTIC PROVINCES IN Q.10] Again, thinking of your last trip and the [#] nights spent in Canada, how many nights were spent in...? (NB, n=68; NL, n=75; NS, n=105; PEI, n=82) *Note: Responses of more than 50 nights were excluded from the calculation of the mean.*



# Reasons Visited Atlantic Canada

Reasons for visiting each Atlantic Canadian province are very similar, encompassing nature/scenery and local history/cultural heritage, as well as a general sense of each province being a good destination.

When asked (unaided) why they chose to visit Atlantic Canada, visitors cited a range of reasons. While the rank order varies, the top four reasons for visiting are consistent across each Atlantic Canadian province. (Table 14)

Reasons Visted Atlantic Canada				
Top Unaided Mentions	 NB	 NL	 NS	 PEI
Sample size (n)	n=68	n=75	n=105	n=82
Good destination/I like it	31%	35%	32%	24%
Nature/Scenery	26%	27%	30%	34%
Local history/Cultural heritage	22%	27%	19%	26%
Reputation/Heard good things about it	13%	11%	14%	15%

Q.14: [IF VISITED ANY ATLANTIC PROVINCES IN Q.10] Why did you choose to visit [Atlantic Provinces mentioned]?





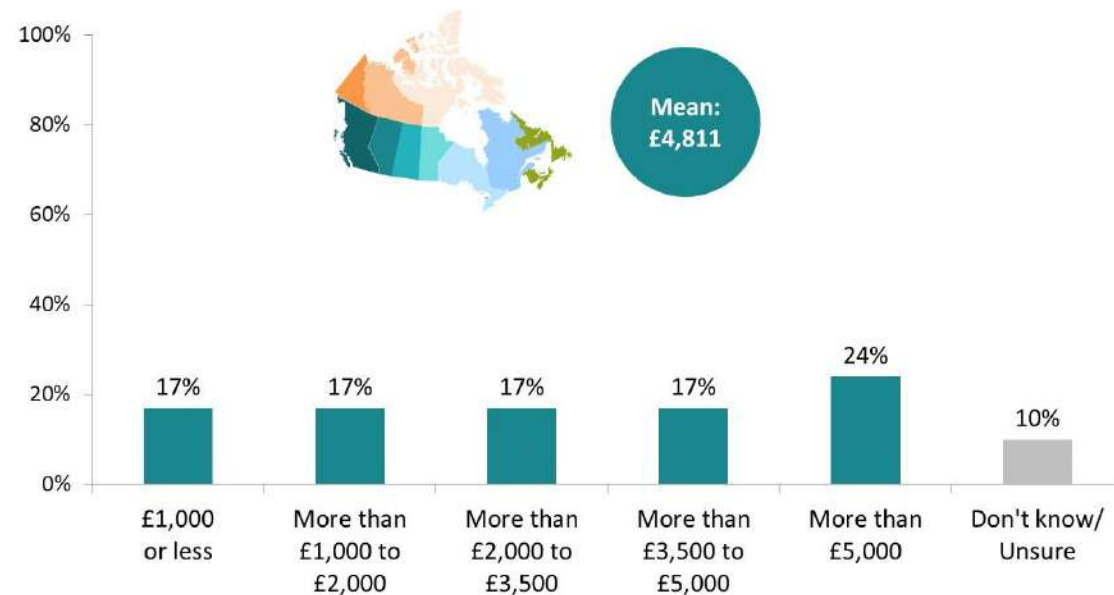
# Budget for Last Trip to Canada

*While there is considerable variation, the average budget for the last trip to Canada was £4,811.*

Approximately one-third of UK visitors had a budget of **up to £2,000** on their last trip to Canada, while one-quarter had a budget of **more than £5,000**. (Table 15)

- As would be expected, the average budget increases notably with household income. It is also highest among parents travelling with children under the age of 18 and lowest among those travelling only with an adult that is not their partner/spouse. Male visitors reported a larger travel budget than female visitors (£5,096 versus £4,404 respectively).
- Regionally, the average budget peaks among visitors from Northwest/Merseyside/Yorkshire/Humberside.

## Total Budget (£) for Last Trip to Canada



Q.15: [IF VISITED 'CANADA' IN Q.9] Again, thinking of your last trip to Canada, what was your total budget for this trip, in pounds (£)? (n=604) *Note: Responses of more than £40,000 and 'Don't know/Unsure' are excluded from the mean.*

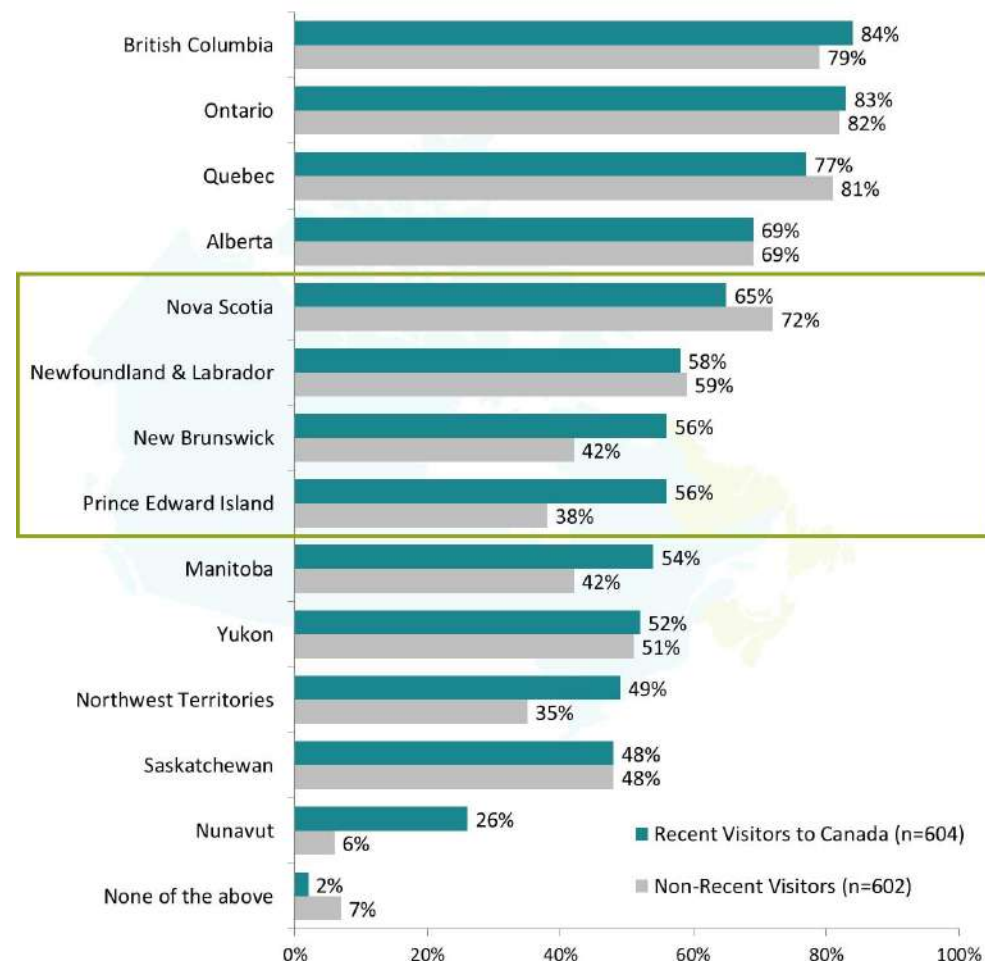
# Awareness of Provinces/Territories

*Ontario, British Columbia, and Quebec garner the highest levels of awareness among UK long-haul travellers, while awareness of the Atlantic Canadian provinces varies.*

Among all UK long-haul travellers (including those who have and have not visited Canada in the past 3 years), most are aware of **Ontario, British Columbia, and Quebec**, with eight in ten being aware. Many are also aware of **Alberta** and **Nova Scotia**, with seven in ten aware of each of these provinces. This is followed by **Newfoundland & Labrador** with six in ten aware. About one-half are aware of various others including **New Brunswick** and **Prince Edward Island**. **Nunavut** has a lower level of awareness. (Table 17)

- Awareness of Canadian provinces and territories increases with age.
- Awareness of certain provinces, including Nova Scotia and Newfoundland & Labrador, is higher among those with household incomes less than £100,000.
- Retired travellers are more apt to be aware of various provinces including all four Atlantic Canadian provinces.
- Awareness of certain provinces/territories is higher among recent visitors to Canada. While the majority of travellers, regardless of past visitation to Canada, are aware of Nova Scotia and Newfoundland & Labrador, recent visitors to Canada are notably more likely than non-recent visitors to report awareness of Prince Edward Island and New Brunswick. That said, non-recent visitors to Canada are more likely than recent visitors to Canada to be aware of Nova Scotia.

## Awareness of Provinces/Territories



Q.17: [AMONG FULL BASE] Prior to this survey, which of the following provinces/territories in Canada, if any, have you ever heard of?



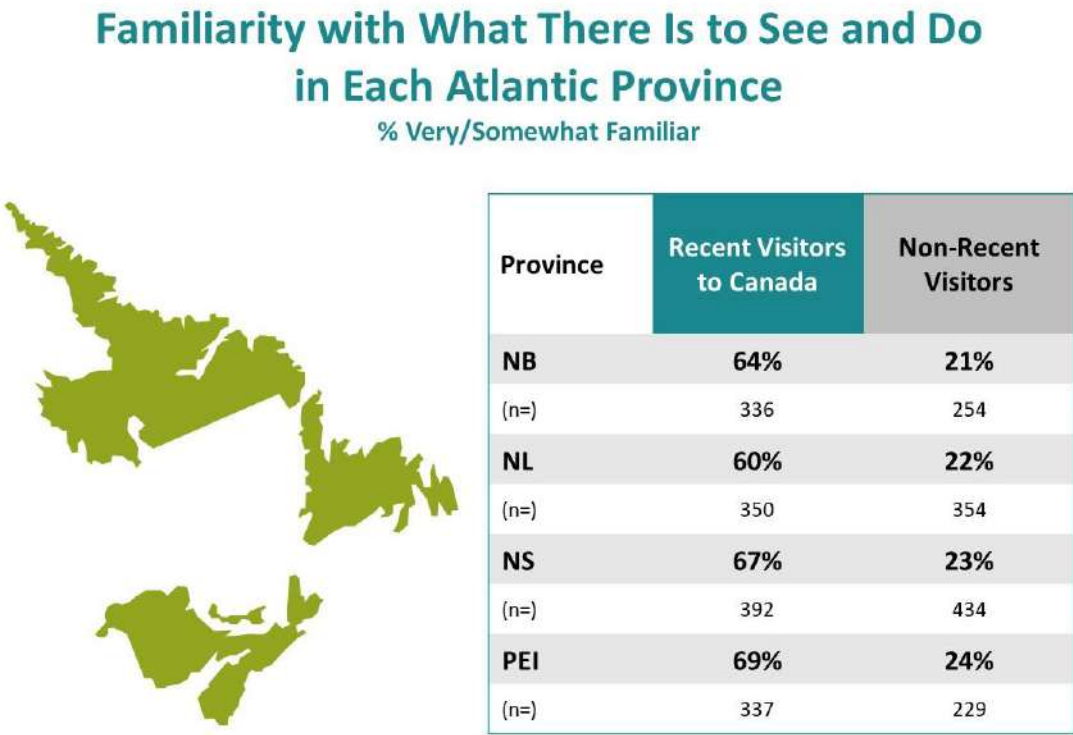
# Familiarity with Atlantic Canada

Recent visitation to Canada clearly influences UK travellers’ familiarity with what there is to see and do in each Atlantic Canadian province.

For each province and/or territory that a respondent was aware of, they were asked to rate their level of familiarity, regardless of whether they had actually visited that province or territory in the past.

When considering familiarity with each Atlantic Canadian province respondents were aware of, findings show that those who have visited Canada in the past three years have a significantly higher level of familiarity of what there is to see and do in each Atlantic Canada province than those who have not.

- Among recent visitors to Canada, between six and seven in ten have some level of familiarity with each Atlantic Canadian province, while no more than one-quarter of non-recent visitors to Canada are familiar with province in the region. (Table 19)
- Familiarity is higher among younger travellers, men, those with higher household incomes, those employed full-time, and parents who typically travel with children under the age of 18.



Q.19: [IF PROVINCES VISITED IN Q.10 OR HEARD OF IN Q17] How familiar are you with what there is to see and do in each of the following Atlantic Canadian provinces while on vacation?





# Travel Intentions

*The following section provides an overview of respondents' future travel intentions for pleasure purposes, including considerations of Atlantic Canada.*



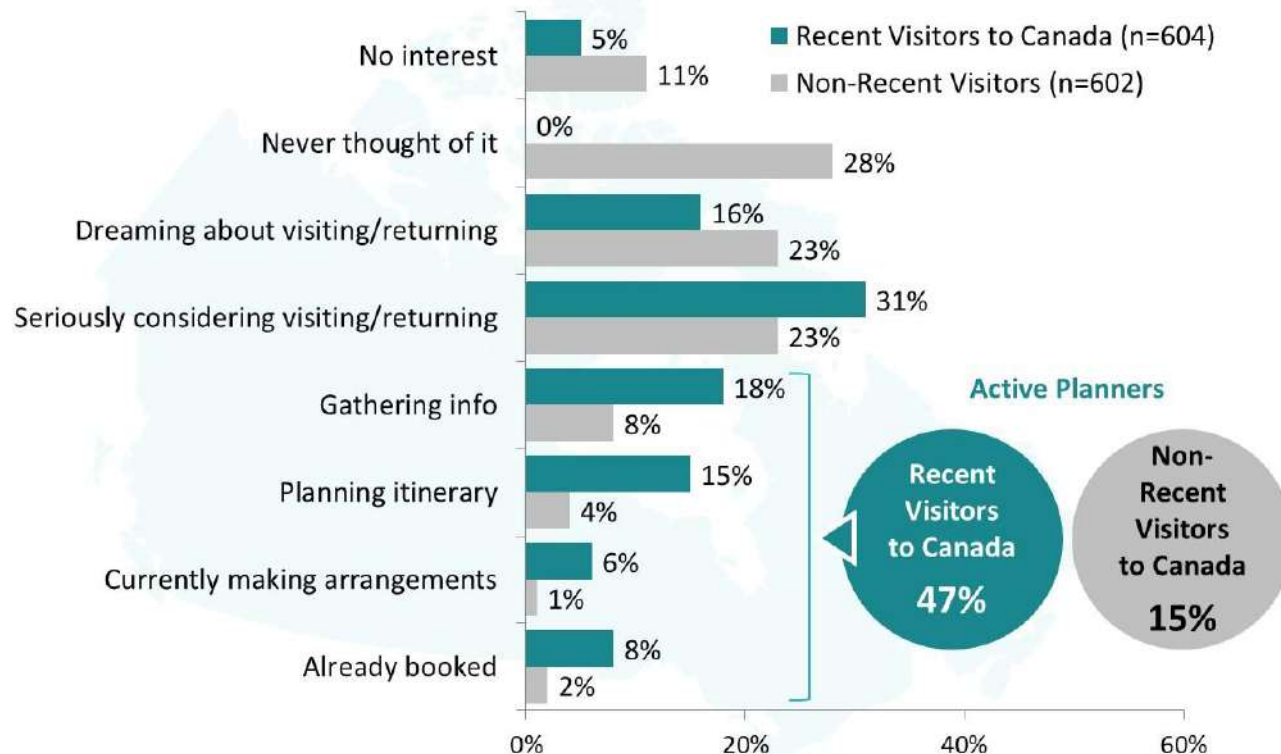
*There is clear intention to visit Canada in the next two years, most notably among those who have recently visited Canada.*

Findings show that those with a recent travel experience in Canada are predisposed to consider future travel to Canada. By contrast, four in ten non-recent visitors to travel to Canada have never thought of it or have no interest in visiting Canada.

(Table 18)

- Recent visitors to Canada are notably more inclined to be actively planning a trip to Canada compared with those who are not recent visitors.
- Younger travellers, those with higher household incomes, those employed full-time, those who typically travel as a parent with children under the age of 18, and those from London/Greater London are more likely to be actively planning than their counterparts. Notably these are all characteristics of past visitors to Canada.

## Intentions to Visit Canada in Next 2 Years



Q.18: Which one of the following statements best describes your intentions to visit **Canada** for a long-haul leisure trip in the next 2 years? (This would be a trip of four or more nights outside the UK, where at least one night is spent in paid accommodations, including trips to visit friends and relatives and combined business-pleasure trips).

*UK travellers are most likely to say they plan to take the same or more trips this year than last, with few expecting to travel less. Notably, many non-recent visitors to Canada say they never travel to Canada.*

In terms of trip length, results for short trips of **three nights or less** and longer trips of **four or more nights** are very similar, with recent visitors to Canada being more inclined to take more of each type of trip than non-recent visitors.

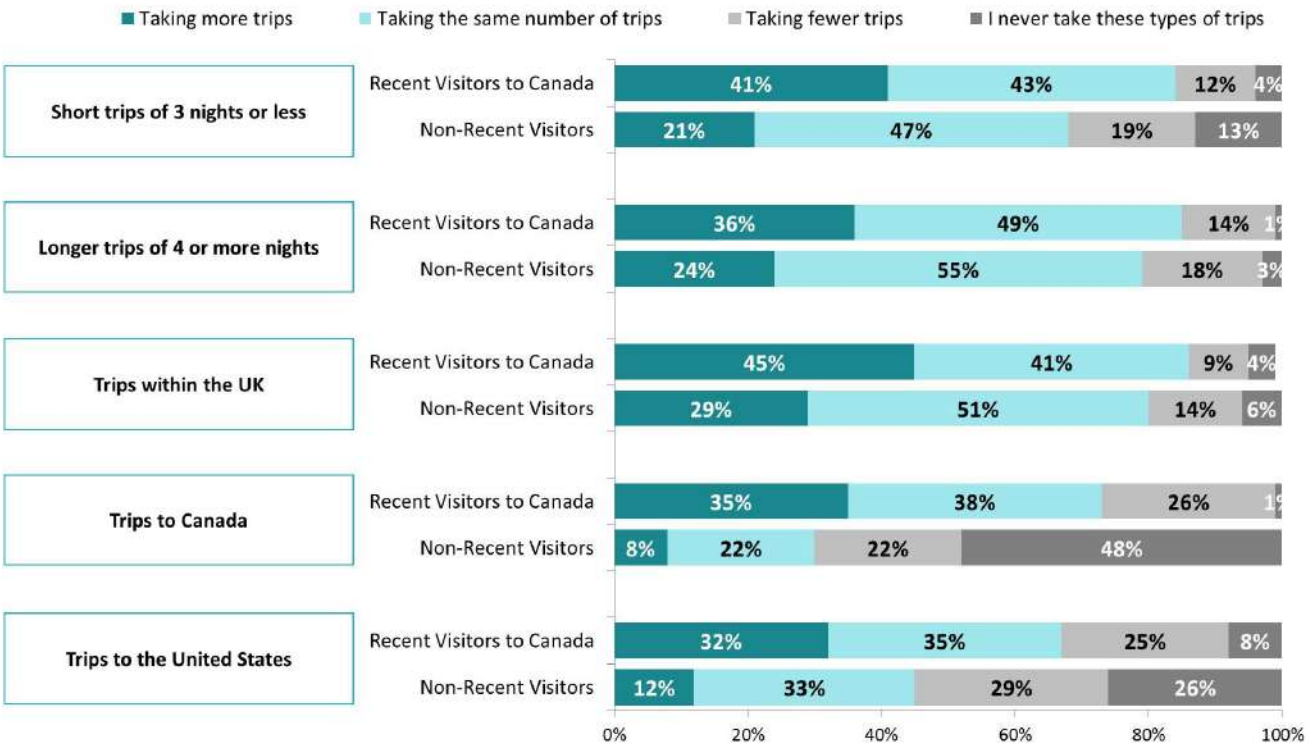
In terms of destination, both audiences are generally planning on taking the same number or more trips **within the UK** as they have in the past year, although once again, recent visitors to Canada are more likely to take more trips within the UK this year compared to last.

When considering trips to Canada, recent visitors to Canada are considerably more likely to take more of such trips in the next year, while one-half of non-recent visitors indicate that they never take trips to Canada.

Recent visitors to Canada’s future travel intentions to the United States are similar to those to Canada. By contrast, non-recent visitors are more inclined to consider travel to the United States than they were to Canada. (Table 16)

- Younger travellers, those with higher household income, those employed full-time, those who typically travel as a parent with children under the age of 18, and those from London/Greater London are more likely to plan on taking more trips than their counterparts. That said, except for trips to Canada or the United States, those who are unemployed/students are as likely as those working full-time to plan for more trips, including domestically within the UK.

Future Travel Intentions



Q.16: For each of the following types of travel, are you considering taking **more** trips, the **same number** of trips, or **fewer** trips this year compared to last year?  
(Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)



# Likely to Consider Atlantic Canada

There are strong intentions among recent visitors to Canada to consider visiting each Atlantic Canadian Province.

Those who are open to visiting Canada were asked the likelihood of considering each Atlantic Canadian province in the next two years, as part of a long-haul leisure trip. At least two-thirds of recent visitors to Canada indicate they would definitely or probably consider each province. In fact, one-half are likely to consider going to all four Atlantic Canadian provinces. (Tables 20a-d and 20a-d combined)

- The likelihood of considering visiting at least one Atlantic Canadian province is higher among recent visitors to Canada, those with higher household incomes, younger travellers, those employed full-time, those who typically travel as a parent with children under the age of 18, and those from London/Greater London.

To provide a more realistic estimation of visitation, an 80/20 rule for predicting behaviour was applied. This rule assumes that 80% of those who say they would **definitely** consider visiting a province in the next two years would actually do so, while only 20% of those who say they would **probably** consider visiting a province would actually do so. Application of this rule provides a more conservative estimate that between 24% and 27% of UK travellers would likely consider visiting each Atlantic Canadian province in the next two years.

## Likely to Consider Visiting in the Next 2 Years

Pre-Ad Full Base	 NB				 NL				 NS				 PEI			
	Recent Visitors to Canada		Non-Recent Visitors		Recent Visitors to Canada		Non-Recent Visitors		Recent Visitors to Canada		Non-Recent Visitors		Recent Visitors to Canada		Non-Recent Visitors	
	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule
Likely	68%*	36%	28%	11%*	70%	35%*	31%	13%	74%*	40%*	32%*	15%	73%	41%	28%	12%
Definitely	38%	30%	10%	8%	36%	29%	12%	9%	41%	33%	14%	11%	44%	35%	11%	9%
Probably	29%	6%	18%	4%	34%	7%	19%	4%	32%	6%	19%	4%	29%	6%	17%	3%

Q.20: When thinking of your travel plans over the next 2 years, how likely are you to consider each of the following Atlantic Canadian destinations as part of a long-haul leisure trip?  
(Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602) \*Due to rounding.



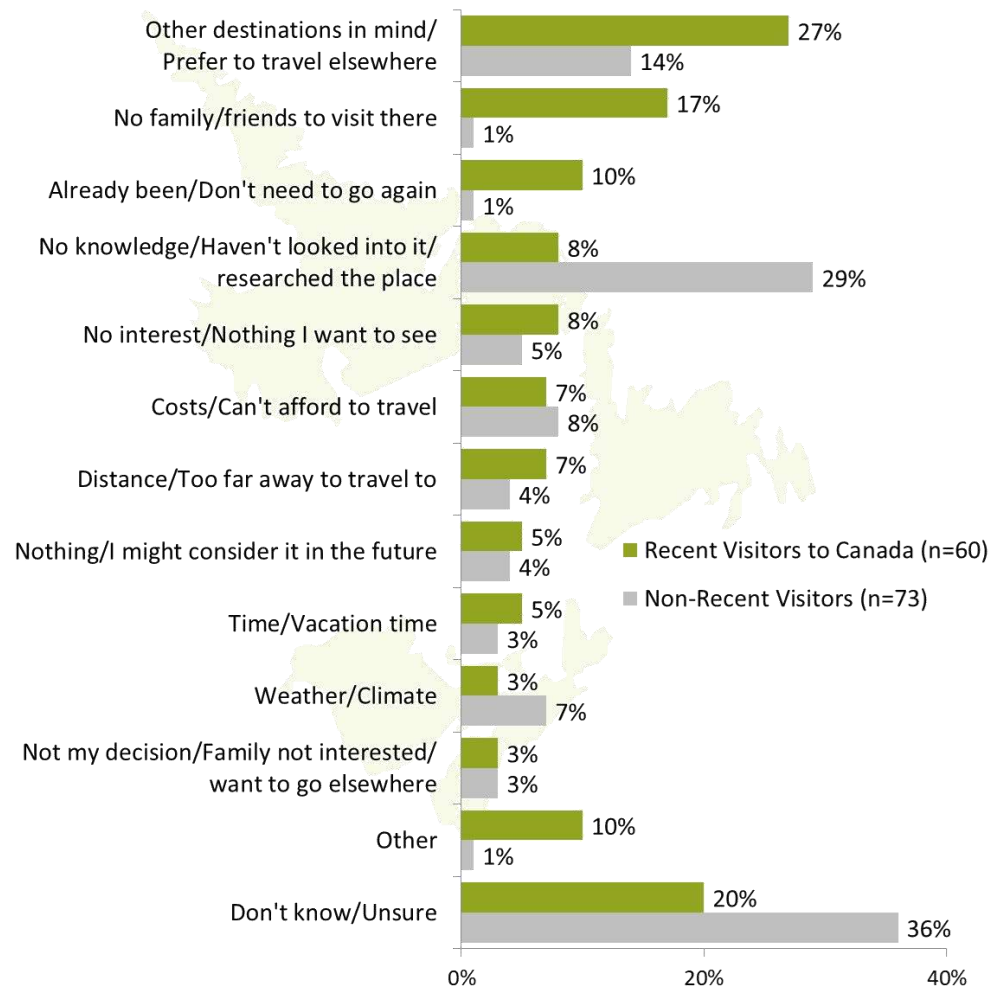
# Barriers to Considering Atlantic Canada

*Among the few barriers mentioned, a preference for travelling elsewhere and lack of knowledge of Atlantic Canada are top reasons for not considering Atlantic Canadian provinces as a vacation destination.*

Those who are unlikely to consider Atlantic Canadian provinces as a vacation destination in the near future (n=133) cite a variety of reasons for their position. (Tables 21a-d)

- Each of **having other destinations in mind/preferring to travel elsewhere** and **no knowledge/haven't looked into it/researched it** are mentioned by two in ten. A variety of other reasons are each mentioned by under one in ten and include there being no family/friends there, costs, and lack of interest, among others.
- Two-thirds of non-recent visitors to Canada, and more than one-quarter of recent visitors to Canada, either cited a lack of knowledge of Atlantic Canada or were unable to identify any barriers. This suggests there is potential to further increase awareness of Atlantic Canada as a destination.
- Non-recent visitors to Canada are more likely to cite a lack of knowledge with the region as a reason, while recent visitors to Canada are more likely to express a preference for other destinations.

## Barriers to Considering Atlantic Provinces as a Vacation Destination



Q.21: [IF 'DEFINITELY WOULD NOT' OR 'PROBABLY WOULD NOT CONSIDER' [PROVINCE] AS A VACATION DESTINATION IN Q.20] What if anything keeps you from considering [NB / NL / NS / PEI] as a vacation destination?





# Trip Logistics

*Most would visit multiple provinces if planning a trip to Atlantic Canada, with airplane and car the most likely means of travel between provinces.*

Three in four of those likely to visit Atlantic Canada would visit multiple provinces, which is notably higher than the 50% of recent visitors to Canada who reportedly visited multiple provinces on their last visit to Canada. (Table 22)

- Those younger and those with higher household incomes are most apt to visit multiple provinces.

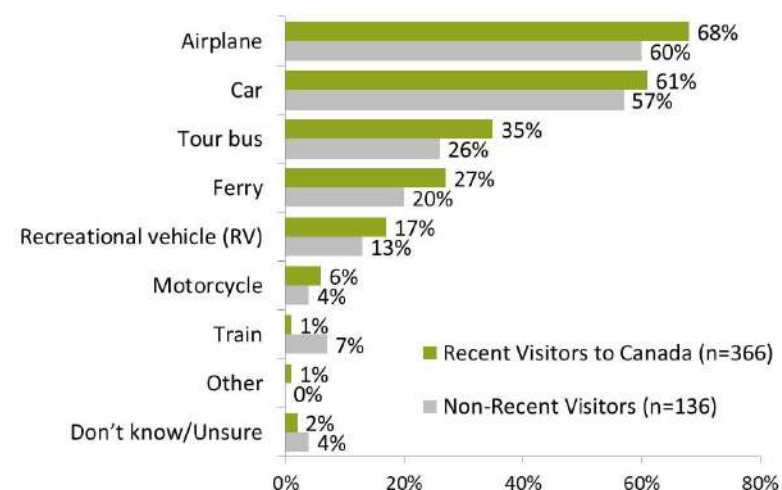
Among those intending to visit multiple provinces, airplane and car are the top modes of travel anticipated between provinces. Tour buses, ferries, and RVs would be used by fewer. (Table 23)

## Planning Visit to a Single or Multiple Provinces in Atlantic Canada in the Next 2 Years



Q.22: [IF MORE THAN ONE ATLANTIC PROVINCE BEING 'DEFINITELY' OR 'PROBABLY' CONSIDERED FOR TRAVEL IN THE NEXT 2 YEARS IN Q.20] If planning a trip to Atlantic Canada, would you visit a single province in the region or visit multiple provinces in Atlantic Canada?  
(Recent Visitors to Canada, n=470; Non-Recent Visitors to Canada, n=195)

## Modes of Travel Between Atlantic Provinces



Q.23: [IF 'WOULD VISIT MULTIPLE ATLANTIC PROVINCES' IN Q.22] What mode(s) of transportation would you use to travel between provinces in Atlantic Canada?



# Motivators

*Various outdoor aspects are key motivators for visiting Atlantic Canada including sightseeing and exploring distinct scenery, seeing natural wonders, and parks.*

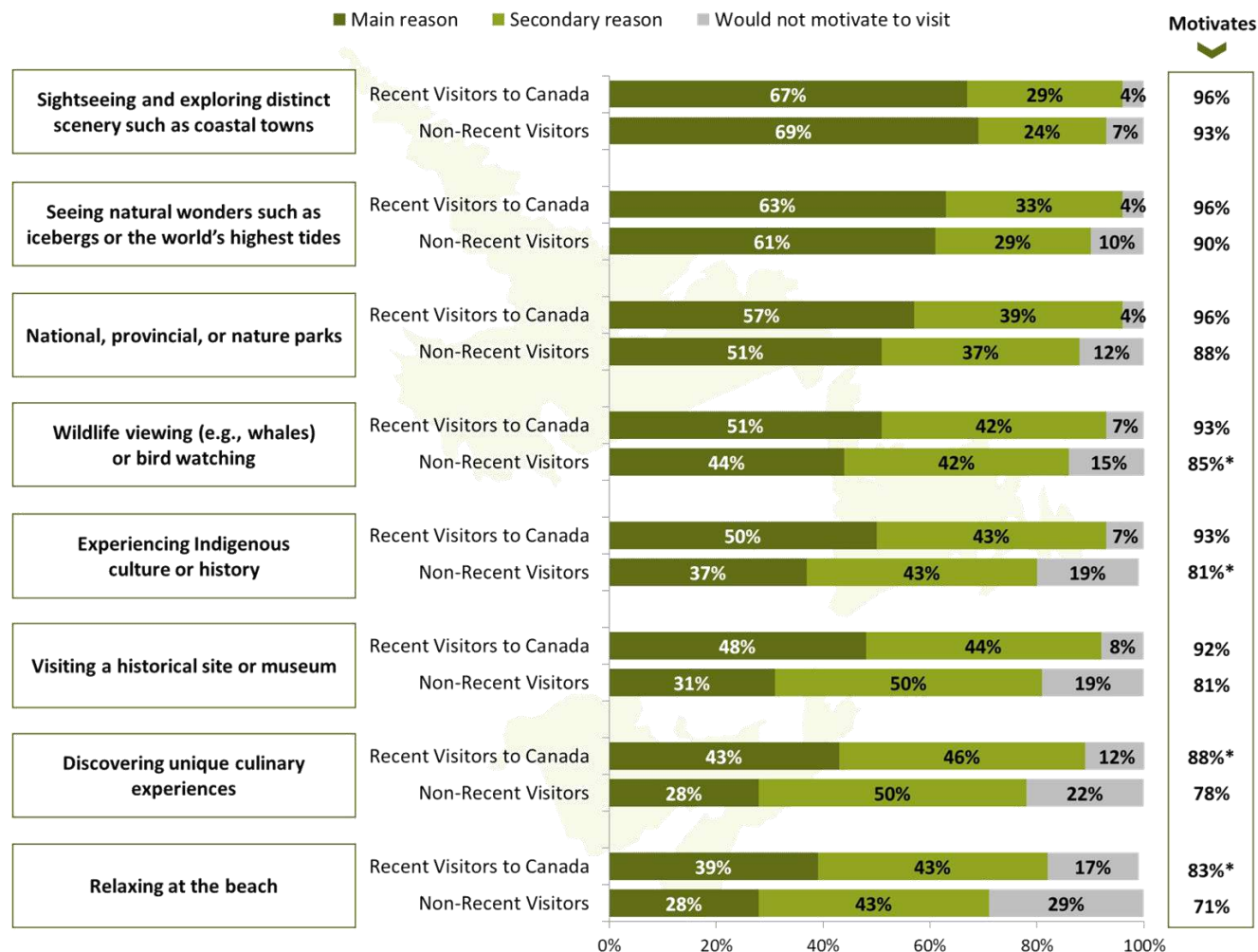
When presented with a list of 16 considerations that may motivate travellers to visit Atlantic Canada, a rank ordering is clearly evident. The eight considerations that are most notable in terms of impacting visitors' decision to visit Atlantic Canada are shown to the right. (Tables 24a-p)

Across audiences, **sightseeing and exploring distinct scenery such as coastal towns** ranks at the top, followed closely by **seeing natural wonders such as icebergs or the world's highest tides**. Rounding out the top three is **national, provincial, or nature parks**. These three reasons are the only considerations identified by a majority as a key motivator to visit Atlantic Canada. Various other reasons would be either a main or secondary motivator for a large majority.

The top motivators are equally appealing across demographics, with recent visitors to Canada and non-recent visitors to Canada being equally as likely to identify exploring distinct scenery and seeing natural wonders as the two top motivators for visiting Atlantic Canada.

It warrants mention that recent visitors to Canada are more likely than non-recent visitors to consider specific experiences as a main reason to visit, including **experiencing Indigenous culture or history**, **visiting a historical site**, or **discovering unique culinary experiences**.

## Motivators to Visit Atlantic Canada



Q.24a-p: If you were travelling to Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island), to what extent would each of the following considerations or offers impact your decision to visit? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602) \*Due to rounding.





# Motivators

Of the 16 considerations presented, the remaining eight considerations are shown to the right.

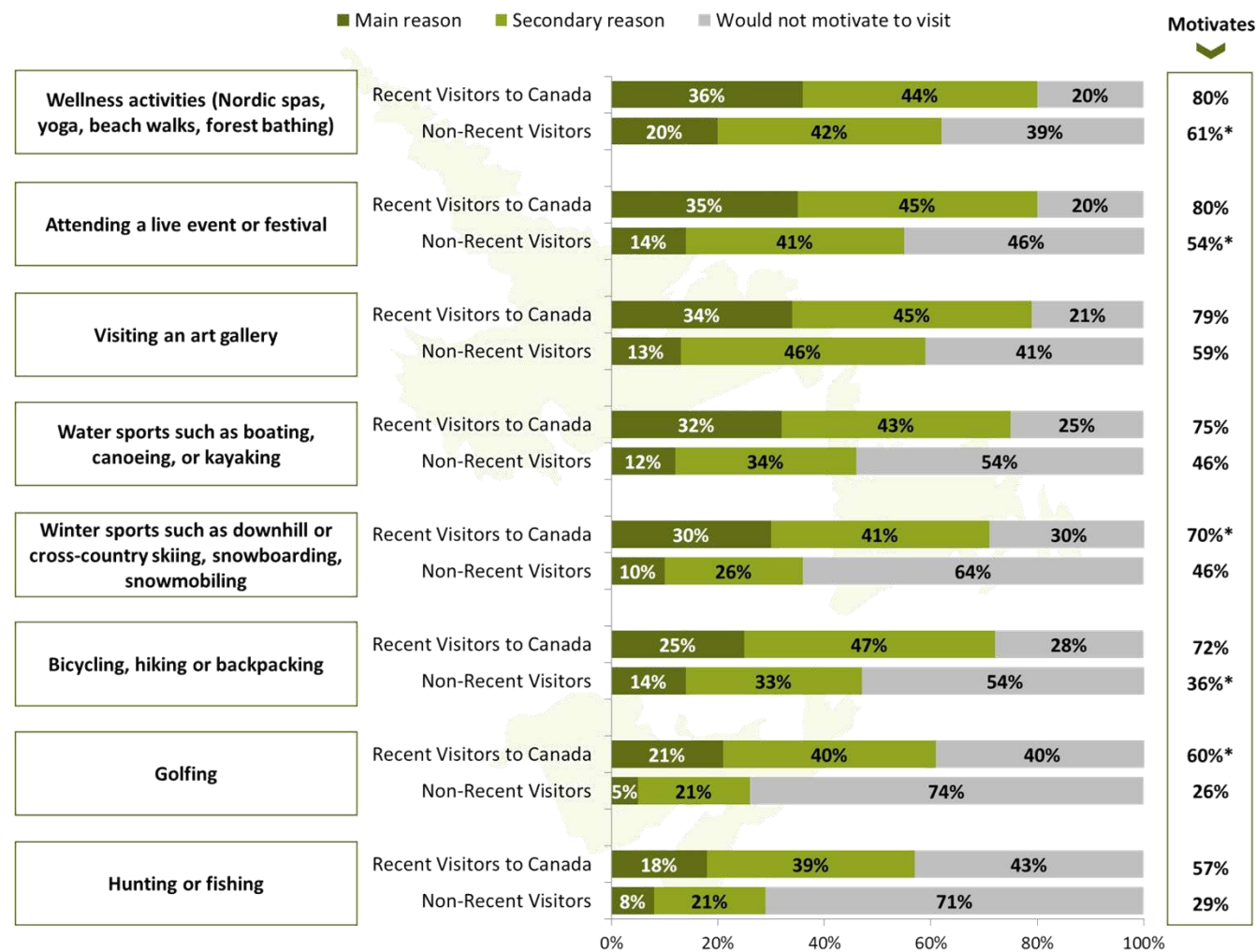
While these considerations are less likely to be considered a main reason impacting the decision to visit, they are all either a main or secondary motivator for a large majority.

Once again, recent visitors to Canada are more likely than non-recent visitors to consider each factor as impacting their decision to visit.

Less motivating considerations for most include various activities such as **water and winter sports, bicycling, hiking or backpacking, golfing, and hunting or fishing**. This does not suggest a lack of interest in undertaking such activities, but rather that these activities are not as likely to be the main reason impacting the decision to visit.

Of note, recent visitors to Canada, including younger travellers, those who typically travel as a parent with children under the age of 18, and those with higher household incomes, are more likely to be motivated by a wider variety of attractions.

## Motivators to Visit Atlantic Canada



Q.24a-p: If you were travelling to Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island), to what extent would each of the following considerations or offers impact your decision to visit? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602) \*Due to rounding.



# Appeal

*Nature, the region's beauty and scenery are the most appealing elements of Atlantic Canada to UK travellers.*

When asked in an open-ended question what about Atlantic Canada most appeals to them, recent visitors to Canada are notably more likely than non-recent visitors to provide a specific aspect. By contrast, more than one-half of non-recent visitors are not sure or say nothing.

Top of mind mentions are **nature/natural environments**, that it is a **beautiful/wonderful place** and **scenery/landscapes/sightseeing**, each identified by one-quarter of recent visitors. **Cultural heritage/history** is noted by two in ten recent visitors, while all other aspects are identified by one in ten or less. (Table 25)

## Verbatim Comments:

*How good the whole place looks and feels amazing.*

*Ruggedness, scenery, [and] coastline.*

*I would love to see different parts of Canada if I was to visit. I wouldn't want to just go to one city.*

*The breathtaking scenery, [and] unique small towns.*

*Wide open spaces.*

*Natural beauty with nature at its best. Stunning coasts and cultural preservation.*

*It all appeals to me but is difficult to get to from Scotland.*

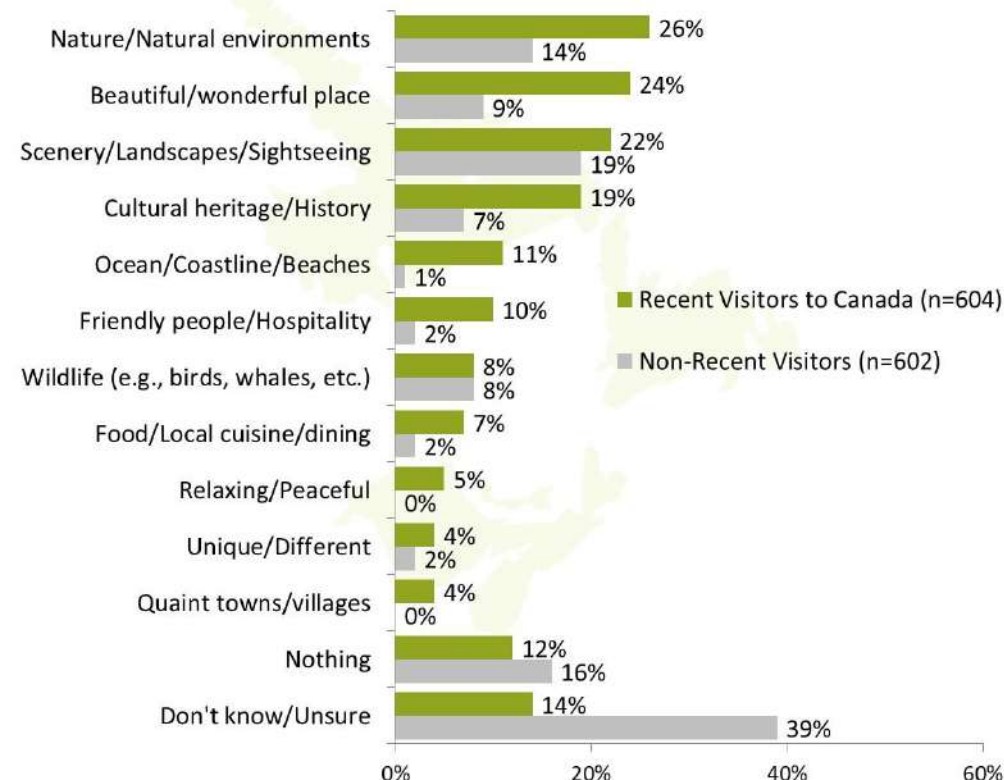
*They speak English. The culture is similar to ours. It is a huge country with diverse countryside and wildlife.*

*Thinking about Atlantic Canada as a vacation destination, I'm drawn to its natural beauty, rich history, and laid-back charm.*

*I find Atlantic Canada appealing for its breathtaking coastal landscapes, fresh seafood, and the laid-back, welcoming atmosphere that makes it feel like an escape from the world.*

## Atlantic Canada Appeal

Unaided Key Mentions



Q.25: Thinking about Atlantic Canada as a vacation destination generally, what, if anything about the region appeals to you?







# Importance of Factors

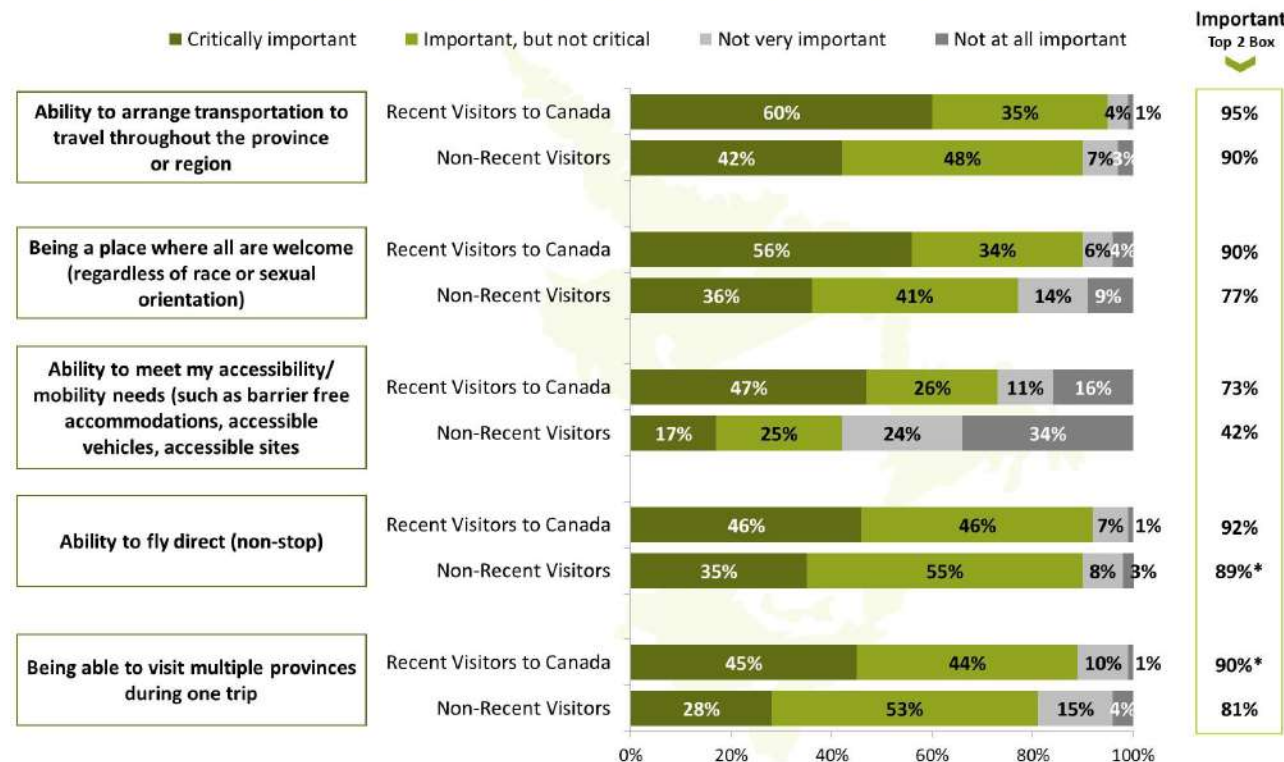
*Ease of transportation across the region is a key consideration in visiting Atlantic Canada, as well as access to direct flights, being a welcoming destination, and having the ability to visit multiple provinces as part of a single trip.*

Of the five factors examined, all but one is considered important by the vast majority of recent visitors to Canada. Ranking at the top is the **ability to arrange transportation to travel throughout the province or region**, with six in ten recent visitors to Canada considering this aspect critically important. Ranking second in terms of being critically important to recent visitors to Canada is **being a place where all are welcome**, with more than one-half considering it so. The **ability to fly direct** and **being able to visit multiple provinces** are also considered important to many.

Recent visitors to Canada are significantly more likely than non-recent visitors to Canada to place importance on the **ability to meet accessibility/mobility needs**. (Tables 26a-e)

- Each of the factors is more likely to be considered critically important by those who have recently visited Canada, as well as those with household incomes of £100,000 or higher.
- Younger visitors, and those who typically travel as parents with children under the age of 18 are more apt to consider the various aspects critically important.

## Important Considerations in Visiting Atlantic Canada



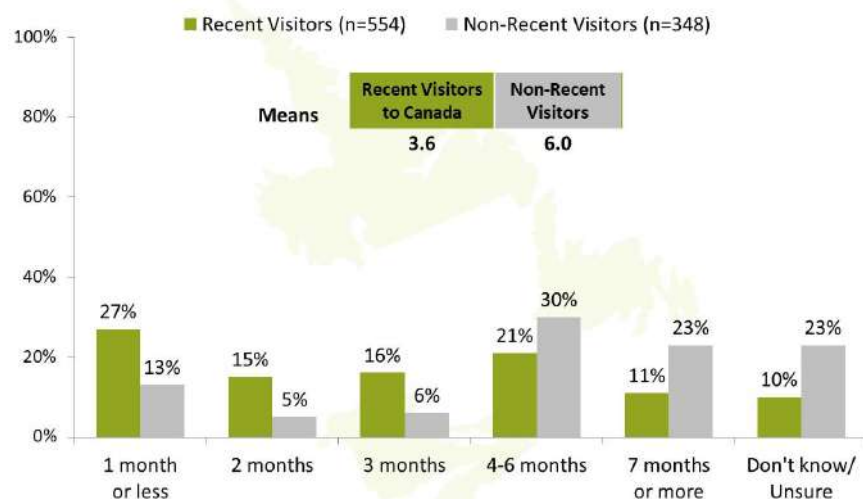
Q.26a-e: How important would each of the following factors be when considering visiting Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island)? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602) \*Due to rounding.

*Planning/researching of trips to Atlantic Canada, as well as the advance booking of trips, is subject to wide variability. Recent visitors to Canada would spend considerably less time on both activities.*

The average number of months anticipated for **advance planning/researching** of trips to Atlantic Canada varies notably depending on whether a UK traveller has visited Canada recently. Indeed, recent visitors to Canada anticipate spending on average 3.6 months to plan an Atlantic Canadian trip, compared to 6.0 months for those who are not recent visitors. A similar trend is evident when looking at the time to book a trip. (Tables 27 and 28)

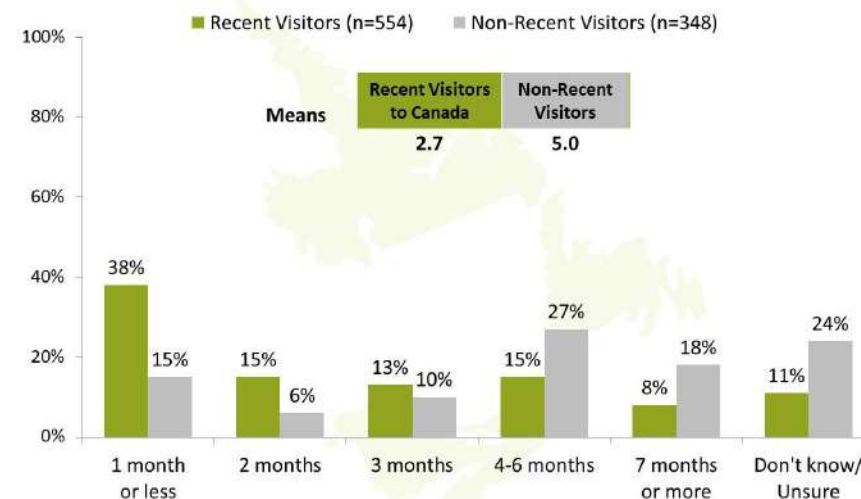
- The average number of months for both planning and booking increases notably with age but declines with household income. The average time is highest among those travelling with a spouse/partner or another adult, and lowest for both travelling with children. Average times for advanced planning and booking are also higher among those retired, followed by those employed part-time.

## Time Spent Planning Atlantic Canadian Trip



Q.27: [IF 'DEFINITELY WOULD CONSIDER' OR 'PROBABLY WOULD CONSIDER' OR 'MIGHT OR MIGHT NOT CONSIDER' ATLANTIC CANADA DESTINATIONS IN Q.20] How many months in advance would you start **planning/researching** such a trip to [RECALL] in Atlantic Canada? *Note: Responses of 'Don't know/Unsure' have been removed from the calculation of the mean.*

## Advance Booking of Trip to Atlantic Canada



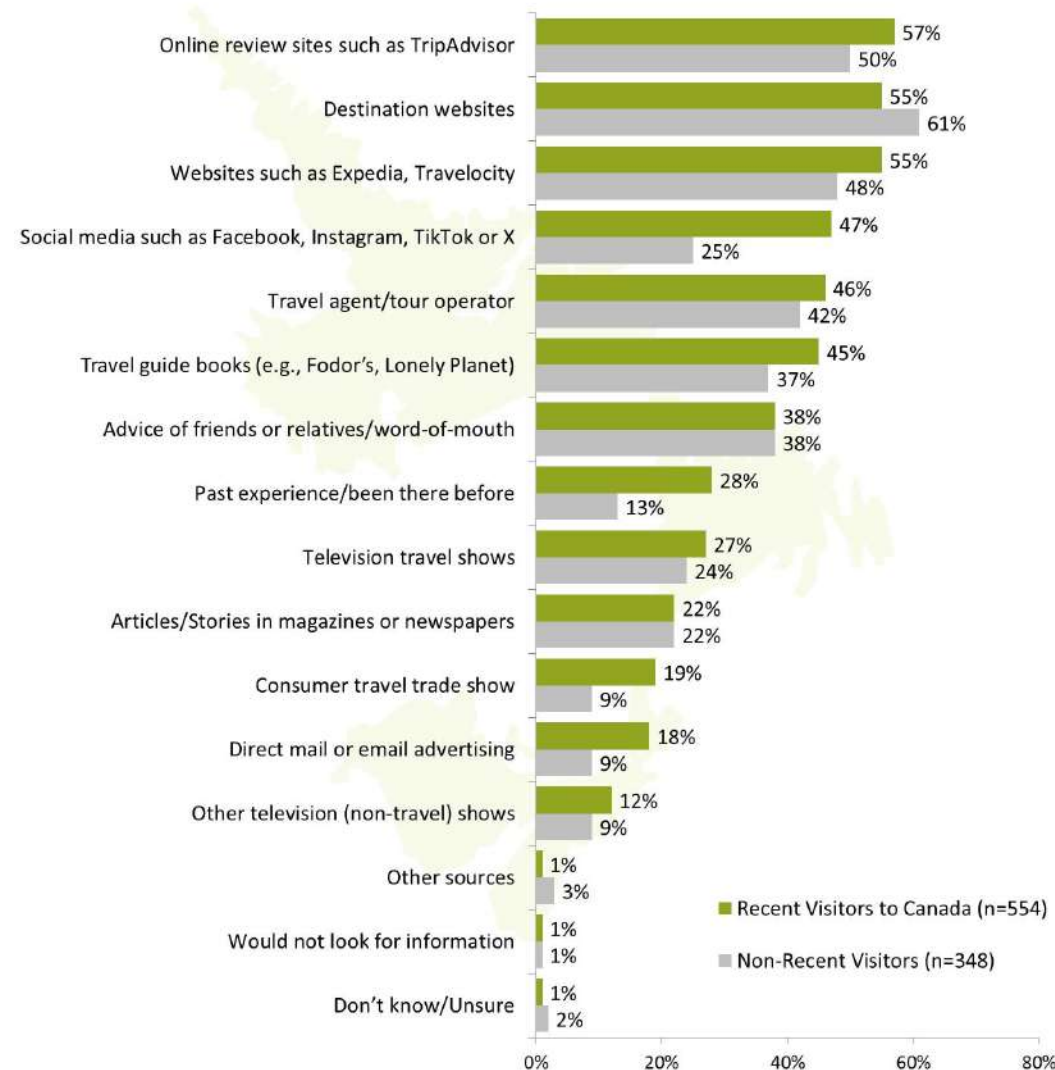
Q.28: [IF 'DEFINITELY WOULD CONSIDER' OR 'PROBABLY WOULD CONSIDER' OR 'MIGHT OR MIGHT NOT CONSIDER' ATLANTIC CANADA DESTINATIONS IN Q.20] And how many months in advance would you start **booking** such a trip to [RECALL] in Atlantic Canada? *Note: Responses of 'Don't know/Unsure' have been removed from the calculation of the mean.*

*UK travellers would look for information on Atlantic Canadian provinces from multiple sources, with destination websites, online review sites such as TripAdvisor, and websites such as Expedia and Travelocity being the most widely used.*

Among those who would consider visiting provinces within Atlantic Canada, over one-half would use each of **destination websites**, **online review sites such as TripAdvisor**, and **websites such as Expedia and Travelocity**. (Table 29)

- Recent visitors to Canada are more likely than non-recent visitors to rely on social media (although these also tend to be younger travellers), as well as their own past experience.
- Younger UK travellers are more apt to turn to social media than older UK travellers. Indeed, social media is the most identified source among 18-34-year-olds, with destination websites less likely to be named among younger travellers.
- Women are more likely than men to rely on word of mouth.
- Reliance on multiple sources is elevated among those with higher household incomes and those typically travelling with children.

## Sources of Information on Atlantic Canada



Q.29: [IF 'DEFINITELY WOULD CONSIDER' OR 'PROBABLY WOULD CONSIDER' OR 'MIGHT OR MIGHT NOT CONSIDER' ATLANTIC CANADA DESTINATIONS IN Q.20] Where would you look for information on [name Atlantic provinces selected at Q20]?

*While most believe there are direct flights to Atlantic Canada from the UK, there is some confusion that New Brunswick and Prince Edward Island offer direct flights from the UK.*

Most UK long-haul travellers believe there are direct flights to Atlantic Canada from the UK, with recent visitors to Canada being more likely than non-recent visitors to believe so. Close to two-thirds of non-recent visitors are uncertain which provinces have direct flights, while one-quarter of recent visitors to Canada are unsure.

Close to one-half of recent visitors to Canada indicate there is a direct flight to **Nova Scotia**, while one in three indicate the same for **Newfoundland & Labrador**. That said, three in ten recent visitors to Canada incorrectly report there being a direct flight between **New Brunswick** and the UK, while two in ten mistakenly report there is a direct flight between the UK and **Prince Edward Island**. (Tables 30 and 31)

- Non-recent visitors to Canada are notably less likely to name specific provinces as having direct flights.
- Younger travellers, those with higher household incomes, those employed full-time, those who typically travel with children under the age of 18, and those from London/Greater London (all characteristics of those who have travelled to Canada in the past three years) are more likely to identify specific provinces as having direct flights from the UK.

## Direct Flights from the UK



	Recent Visitors to Canada	Non-Recent Visitors
<b>Believe they can fly non-stop to Atlantic Canada from the UK</b>	80%	74%
<b>With Direct Flights to...</b>		
NS	47%	24%
NL	31%	15%
NB	30%	12%
PEI	18%	5%
Don't know/Unsure	25%	64%

Q.30: To the best of your knowledge, can you fly direct (non-stop) to Atlantic Canada from the United Kingdom?

(Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

Q.31: [IF AWARE CAN FLY DIRECT TO AC FROM THE UK – 'YES' IN Q.30] Which province(s) in Atlantic Canada can you fly directly to (non-stop) from the UK?

(Recent Visitors to Canada, n=483; Non-Recent Visitors to Canada, n=446)



*Travel agents/tour operator services are widely used by UK travellers, particularly for booking flights and accommodations.*

Three-quarters of recent visitors to Canada travellers would use a travel agent or tour operator to help plan, organize or book travel arrangements, if they were planning a trip to Atlantic Canada, compared to six in ten non-recent visitors. (Table 32)

- Younger travellers, those with household incomes of £100,000 or higher, and those travelling as a parent with children under the age of 18 are more likely to use a travel agent/tour operator.

**Booking flights** and **booking accommodations** are the two travel agent/tour operator services most likely to be used if planning a trip to Atlantic Canada, although recent visitors to Canada are less likely than non-recent visitors to Canada to use a travel agent for those activities. A variety of other services would also be used, albeit to a lesser extent. Approximately one-half would use travel agents/tour operators for **booking activities to see and do**, **asking for recommendations of what destinations to visit**, and **booking ground transportation**. (Table 33)



Q.32: If planning a trip to Atlantic Canada, would you use a travel agent or tour operator to help plan, organize or book your travel arrangements? (This would not include using online travel booking websites such as Expedia). (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

Q.33: [IF WOULD USE A TRAVEL AGENT OR TOUR OPERATOR IN Q.32] What services would you likely use a travel agent/tour operator for when planning a trip to Atlantic Canada (i.e., New Brunswick, Newfoundland & Labrador, Nova Scotia and Prince Edward Island)?



# Ad Evaluations

*The following section provides an overview of perceptions of general visual elements that may be incorporated into a tourism campaign, as well as respondents' perceptions of the 2024-2025 advertising campaign for each Atlantic Canadian province. For each province, one 30-second video and online ads were presented.*

*As the ads have different messaging and intent, results are not meant to be comparative. Rather, results are intended to provide direction in terms of how each ad is received and its impact on traveller perceptions. Note, provincial ads were shown and evaluated one at a time, with the presentation order rotated to minimize biases.*

*After reviewing the advertisements for each province, UK travellers were subsequently asked to evaluate the campaign on various attributes.*



*While all image concepts hold some level of appeal to visitors, six images centered around nature/scenic beauty are identified as most effective in attracting visitors to the Atlantic Canada region.*

Prior to viewing the advertising videos for each Atlantic Canadian province, UK travellers were asked to evaluate a series of images of places and things to do in Atlantic Canada and asked how effective they personally felt each image would be in attracting them to Atlantic Canada for a vacation.

- While all images presented are deemed to have some degree of effectiveness for the majority of travellers, the top six images are considered especially effective to recent visitors to Canada, with six in ten or more stating each of those images would be 'very effective' in attracting them to Atlantic Canada for a vacation. Of note, all action-based images were considered more effective to recent visitors to Canada. (Tables 34a-l)



Q.34a-l: The following presents a series of images of places and things to see or do in Atlantic Canada. Please indicate how effective each image would be in attracting you to Atlantic Canada for a vacation?  
(Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602) \*Due to rounding.

# Ad Evaluation: Overall Findings

*While reactions to each campaign were analyzed separately, across campaigns, those who have personally experienced Canada are notably more likely than non-recent visitors to find each campaign appealing, and to offer agreement on all aspects of each campaign assessed.*

As the ads had different messaging and intent, results are not meant to be comparative; however, a general overview of reactions across key segments warrants mention.

- Regardless of the campaign shown, recent visitors to Canada are notably more likely than non-visitors to find each campaign **appealing**.
- Across provinces, the ads are assessed similarly by recent visitors, with all provinces being rated equally as positive. By contrast, among non-visitors, the level of appeal varies, with the Newfoundland & Labrador and Nova Scotia campaigns being rated more positively than New Brunswick and Prince Edward Island ads.
- Recent visitors to Canada are notably more likely than non-visitors to offer agreement on each aspect of the campaigns assessed, including whether they contain things of personal interest, are attention-getting, showcase unique offerings, personally speaks to them, encourages them to visit the respective province, and would motivate them to visit the province in the future.
- At the same time, among UK travellers in general, those in the highest household income category (£100,000+) and those under the age of 35 are more likely than their respective counterparts to offer favourable assessments in general across all four campaigns, both in terms of overall campaign appeal and the six elements assessed. (Tables 35 and 36a-f)

Ad Evaluation: Overall Findings

	NB		NL		NS		PEI	
	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors
% Extremely Appealing/Very Appealing								
After seeing these ads, how appealing is [PROVINCE] as a place to visit on vacation	80%	57%	89%	77%	86%	72%	82%	53%
% Strongly Agree/Somewhat Agree								
These ads include things of interest to me	83%	59%	89%	77%	88%	74%	81%	55%
These ads grab my attention	80%	58%	87%	76%	86%	70%	81%	54%
These ads encourage me to find out more about [PROVINCE]	80%	55%	86%	71%	85%	68%	81%	53%
These ads show unique offerings	80%	58%	89%	74%	83%	66%	79%	52%
These ads motivate me to travel to [PROVINCE] in the future	78%	49%	85%	67%	85%	64%	77%	46%
These ads speak to me personally	75%	47%	80%	62%	79%	58%	74%	45%

Q35: We are now going to show you a video and an online ad for each of the four Atlantic Canadian provinces. Please review the ads for each province and answer the questions that follow. We are interested in your opinion of the ads even if you do not intend to visit this area of Canada. After seeing these ads how appealing is [NEW BRUNSWICK] as a place to visit on vacation? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)  
 Q36a-f: To what extent do you agree or disagree with each of the following statements about the ads for [PROVINCE]? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)



*Most UK travellers find the New Brunswick campaign appealing, although the ads resonate more so with recent visitors to Canada and younger travellers.*

- Eight in ten recent visitors to Canada consider the New Brunswick ads **appealing**, with fewer than one-half deeming them to be *extremely* appealing. That said, the campaign holds greatest appeal to a younger audience. While nearly nine in ten (86%) travellers 18-34 find the ads appealing, only one-half of travellers 55 years of age and older (51%) express the same view.
- Across all aspects of the campaign assessed, recent visitors to Canada are notably more likely to offer agreement in terms of the campaign's performance. Eight in ten recent visitors to Canada agree the ads include things of interest to them, while similar proportions agree the ads grab their attention, show unique offerings, and encourage them to find out more about New Brunswick. Three-quarters of recent visitors to Canada agree that the ads speak to them personally. (Tables 35 and 36a-f NB)



Q.35: We are now going to show you a video and an online ad for each of the four Atlantic Canadian provinces. Please review the ads for each province and answer the questions that follow. We are interested in your opinion of the ads even if you do not intend to visit this area of Canada. After seeing these ads how appealing is [NEW BRUNSWICK] as a place to visit on vacation? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

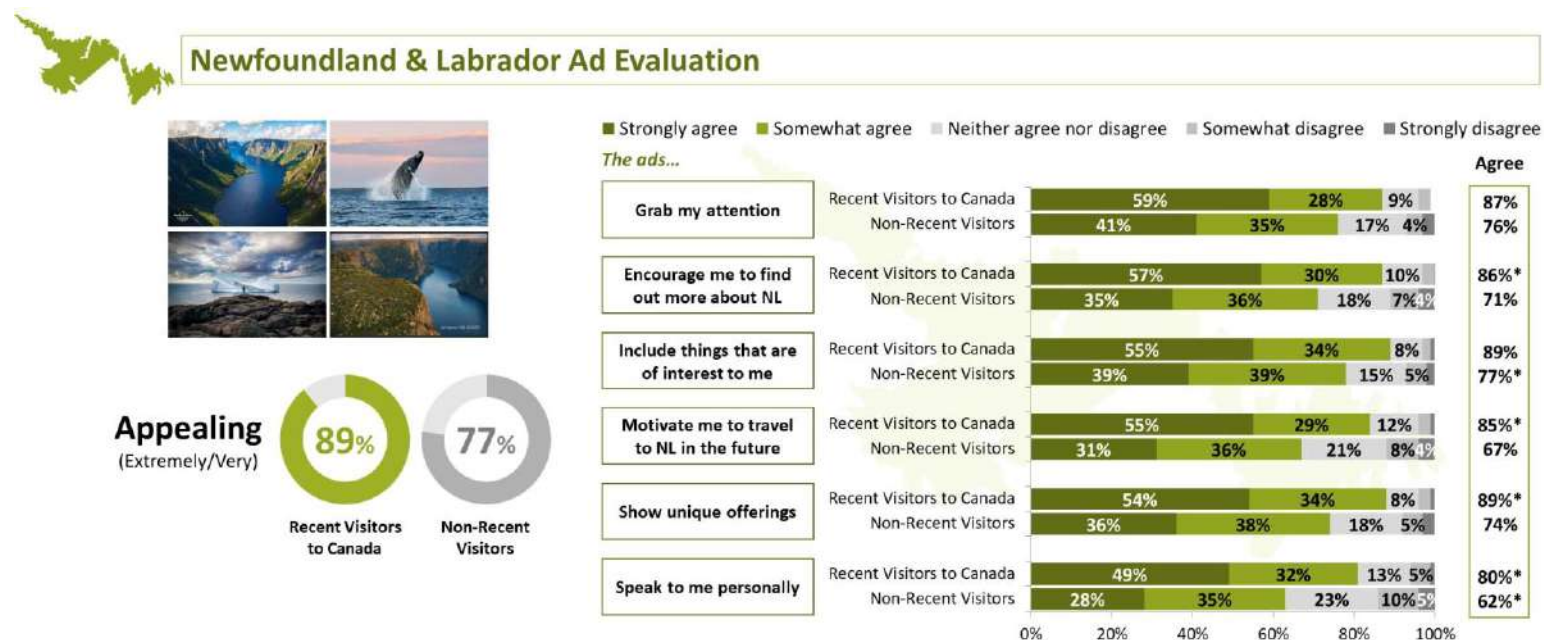
Q.36a-f: To what extent do you agree or disagree with each of the following statements about the ads for [NEW BRUNSWICK]? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

Note: Mentions of 3% or less are represented by a bar. \*Due to rounding.

# Ad Evaluation: Newfoundland & Labrador

The bulk of UK travellers find the Newfoundland & Labrador campaign appealing, with a strong majority agreeing the ads grab their attention, include things of personal interest, and showcase the Province's unique offerings.

- Nine in ten recent visitors to Canada consider the Newfoundland & Labrador ads appealing, with one-half deeming them *extremely* appealing. Results are generally consistent across visitor segments. By contrast, three-quarters of non-recent visitors to Canada consider the campaign appealing.
- Nine in ten recent visitors to Canada also offer some level of agreement that the ads include things of interest to them, while similar proportions agree the ads grab their attention, encourage them to find out more about the Province, and show unique offerings. Recent visitors to Canada are more likely than non-recent visitors to offer agreement on each of these factors, although a clear majority of non-recent visitors to Canada offer agreement to each of these factors. (Tables 35 and 36a-f NL)



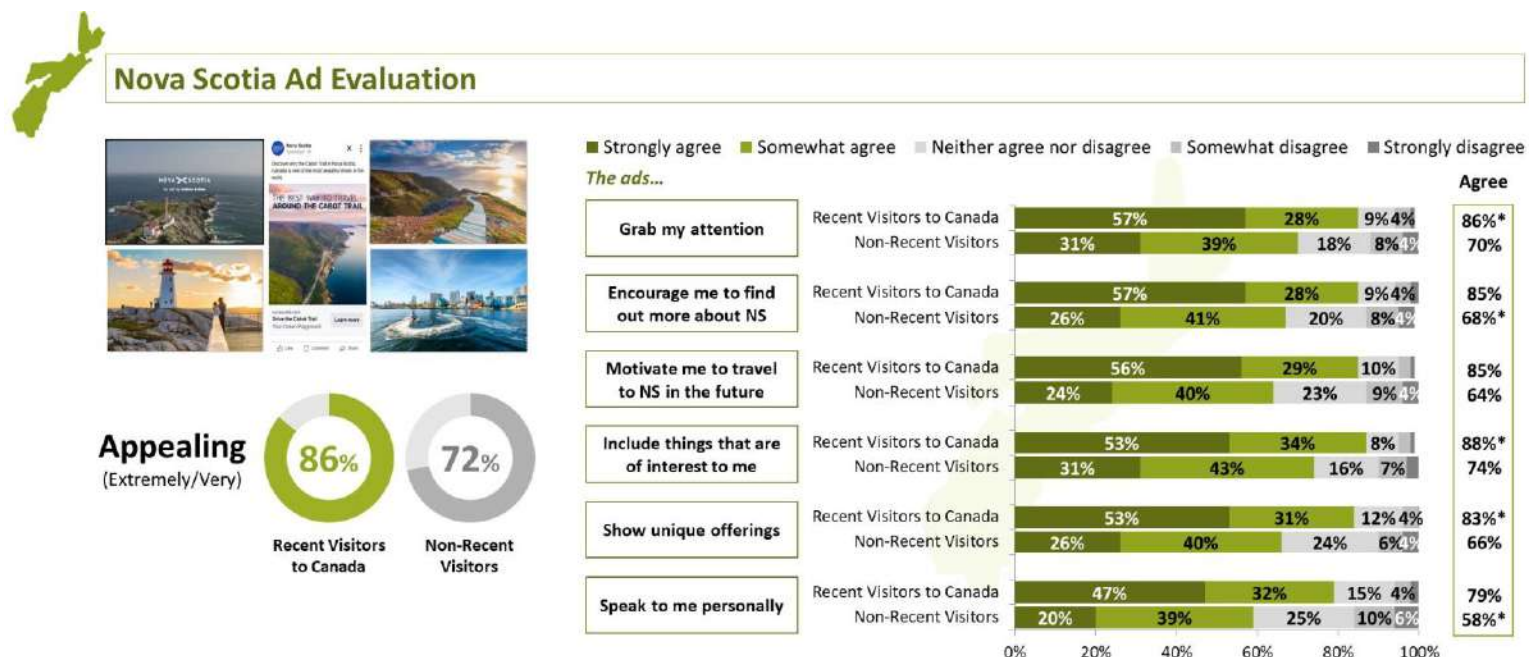
Q.35: We are now going to show you a video and an online ad for each of the four Atlantic Canadian provinces. Please review the ads for each province and answer the questions that follow. We are interested in your opinion of the ads even if you do not intend to visit this area of Canada. After seeing these ads how appealing is [NEWFOUNDLAND & LABRADOR] as a place to visit on vacation? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

Q.36a-f: To what extent do you agree or disagree with each of the following statements about the ads for [NEWFOUNDLAND & LABRADOR]? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

Note: Mentions of 3% or less are represented by a bar. \*Due to rounding.

*The Nova Scotia ad campaign performs well among the majority of UK travellers, with most finding it appealing.*

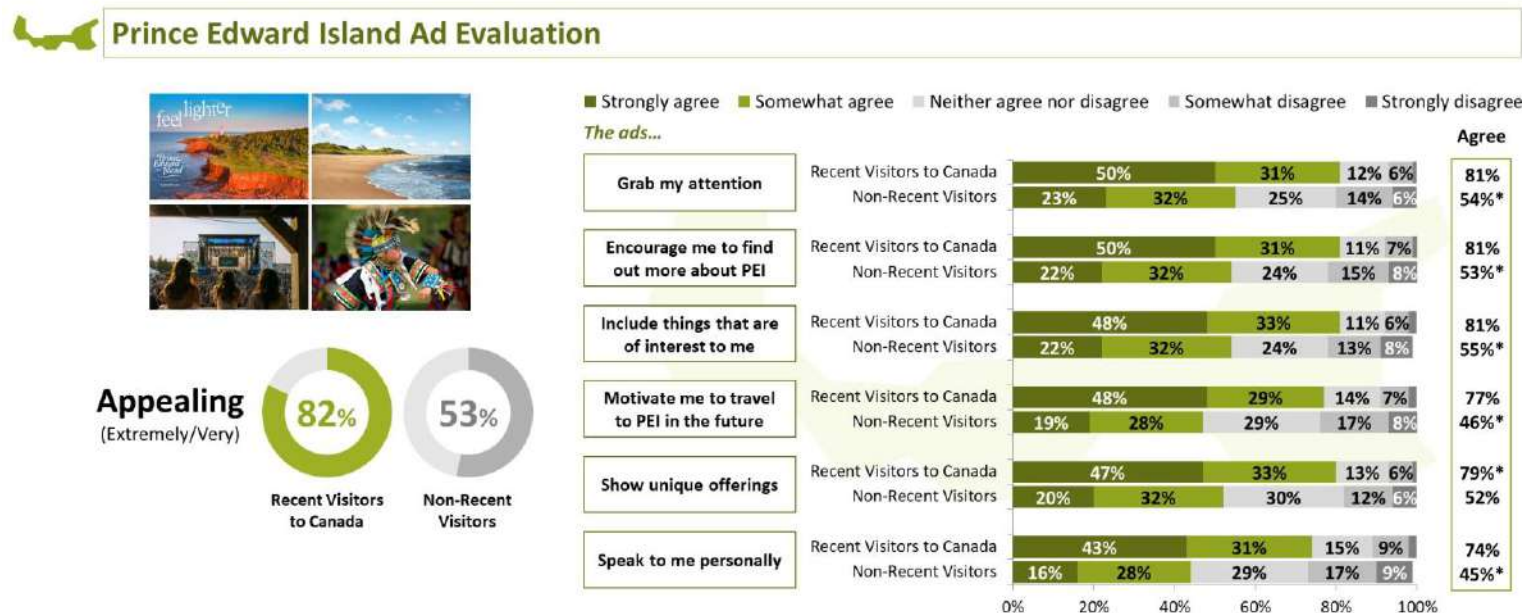
- Close to nine in ten recent visitors to Canada consider the Nova Scotia ads appealing, with one-half deeming them to be *extremely* appealing.
- More than eight in ten recent visitors to Canada offer some level of agreement that the ads grab their attention, while a similar proportion agree the ads include things of interest to them, encourage them to find out more about Nova Scotia, motivate them to travel to Nova Scotia in the future, and show unique offerings. Eight in ten recent visitors to Canada offer some level of agreement that the ads speak to them personally. While non-recent visitors to Canada also rate the campaign positively, agreement is less pronounced on all factors. (Tables 35 and 36a-f NS)





The Prince Edward Island ads are appealing to recent visitors to Canada and considered attention-getting, incorporating things of personal interest, and encouraging them to learn more about the Province.

- Eight in ten recent visitors to Canada considered the Prince Edward Island ads appealing, with more than four in ten deeming them to be *extremely* appealing. Opinions are notably less pronounced among non-recent visitors.
- Eight in ten recent visitors to Canada offer some level of agreement that the ads grab their attention, while similar proportions agree the ads include things of interest to them, encourage them to find out more about Prince Edward Island, show unique offerings, motivate them to travel to Prince Edward Island in the future and speak to them personally. (Tables 35 and 36a-f PEI)



Q.35: We are now going to show you a video and an online ad for each of the four Atlantic Canadian provinces. Please review the ads for each province and answer the questions that follow. We are interested in your opinion of the ads even if you do not intend to visit this area of Canada. After seeing these ads how appealing is [PRINCE EDWARD ISLAND] as a place to visit on vacation? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

Q.36a-f: To what extent do you agree or disagree with each of the following statements about the ads for [PRINCE EDWARD ISLAND]? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

Note: Mentions of 3% or less are represented by a bar. \*Due to rounding.



# Likelihood to Consider Atlantic Canada After Seeing Ads – By Province

*Overall, ad exposure positively impacts likelihood to consider visitation to Atlantic Canada, and impact is most evident for Nova Scotia and Newfoundland & Labrador.*

In order to gauge the potential impact these ads would have on influencing travellers' propensity to visit each province in Atlantic Canada, after all ads were assessed, UK travellers were once again asked their likelihood of considering taking a pleasure trip to each Atlantic Canadian province in the next two years. (Tables 37a-d and 37a-d combined)

- As shown below, likelihood of considering visiting each province increases slightly after seeing the ads.
- Regardless of province, recent visitors to Canada are more than twice as likely as non-recent visitors to consider visiting Atlantic Canada. Across both audiences, post ad exposure, the greatest impact in visitation is evident for Nova Scotia and Newfoundland & Labrador.
- Again, to obtain a more realistic estimation of visitation following ad exposure, the application of the 80/20 rule suggests that a more conservative estimate would be that 31%-41% of recent visitors to Canada would likely consider visiting each Atlantic Canadian province after the seeing the ads, compared to between 11%-18% of non-recent visitors to Canada.

## Likely to Consider Visiting Atlantic Canada in the Next 2 Years

Full Base	NB				NL				NS				PEI			
	Pre-Ad		Post-Ad		Pre-Ad		Post-Ad		Pre-Ad		Post-Ad		Pre-Ad		Post-Ad	
	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors
Likely to Consider	68%	28%	71%	31%	70%	31%	74%	40%	74%	32%	78%	41%	73%	28%	72%	32%
80/20 Rule Applied	36%	11%	40%	13%	35%	13%	41%	17%	40%	15%	45%	18%	41%	12%	42%	15%

Q.20: When thinking of your travel plans over the next 2 years, how likely are you to consider each of the following Atlantic Canadian destinations as part of a long-haul leisure trip? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

Q.37a-d: Now that you have seen ads for each Atlantic Canadian province, how likely are you to consider taking a pleasure trip to each of the following destinations in the next 2 years? (Recent Visitors to Canada, n=604; Non-Recent Visitors to Canada, n=602)

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